



PHSO

Parliamentary and Health Service Ombudsman replaces finance system to reduce costs and provide powerful platform for the future.

SOLUTION SNAPSHOT

Solution:

- Infor SunSystems, Professional Advantage iPOS eProcurement, Infor Query and Analysis (Q&A) and Spindle Professional.

Benefits:

- End of life financial system replaced in advance of financial year end
- Complete oversight of spending activity
- Improved ability to analyse transactions
- Automation reduces administration and allows PHSO to operate more efficiently
- Electronic document delivery reduces paper, postage and administration

The client

Parliamentary and Health Service Ombudsman (PHSO) is a free and independent service set up by Parliament.

Its role is to investigate complaints that individuals have been treated unfairly or have received poor service from government departments, other public organisations and the NHS in England.

It is responsible for making the final decisions on complaints about these public services for individuals. PHSO also aims to learn from complaints to help improve public services.

The challenge

PHSO's finance system was reaching end of life and software support was due to end the following year.

Additionally the software was no longer meeting the organisation's requirements. PHSO wanted greater overall financial control and to automate routine financial administration following a reduction in the number of financial and purchasing staff.

A new finance system was required, however timescales were exceedingly tight; PHSO needed to get the new system up and running in advance of financial year end – otherwise the project would have been delayed for several months.

With their current system reaching end of life and not performing as required, a delay was not an option.

The **smarter** way

The solution

TouchstoneFMS was selected after a competitive tender process to help PHSO achieve its goals.

PHSO selected Infor SunSystems as its new financial management system.

PHSO also invested in the Professional Advantage iPOS eProcurement solution, which would help it manage its purchasing processes.

To complete the solution, Infor Query and Analysis (Q&A) Reporting for both would provide the ability to analyse and understand the transactions that PHSO was undertaking while Spindle Professional would allow for electronic document delivery.

TouchstoneFMS worked with PHSO to successfully replace its finance system with time to spare to ensure the systems were working optimally before year end.

The new Infor SunSystems implementation means PHSO now has a fully supported finance system that gives it a powerful platform for the future.

iPOS eProcurement gives PHSO complete oversight of its procurement process. From the initial requisition through to purchase order, receipt and finally three-way invoice matching – the process is now automated and efficient.

"We now have improved visibility of procurement across PHSO," explains Mike Procter, Executive Director of Finance at PHSO. "Not only does the system reduce administration significantly, it gives us complete oversight of all spending activity."

The system also allows for more efficient invoice processing, improving relationships with suppliers. Meanwhile staff are spending less time on manual administration matching invoices to purchase orders allowing the team to operate more efficiently.

Cost cutting in the public sector has been a topic of great scrutiny and the PHSO has faced its own requirements to reduce expenditure. But for PHSO, this was not just a matter of cost containment.

As part of a five year strategy PHSO has publicly outlined a number of objectives, including "making more use of technology to deliver its services and to generate more insight into public sector performance."

Procter feels the project is a perfect example of using technology to improve public service delivery.

"I wanted the solution to deliver real value to the organisation and assist us with our service delivery," explains Procter. "While it will help us reduce costs and administration it has far more strategic value than that. We now have greater insight into our finances and purchasing as well as a platform that allows us to really understand what we're doing and if it provides value."

With such an aggressive timescale and on such a highly visible project, PHSO needed a partner that understood the importance of successful project delivery.

As part of TouchstoneFMS's established project management methodology the plan was clearly communicated to PHSO and regular communication between all parties was key.

"TouchstoneFMS's approach gave us peace of mind on such a critical project," says Procter. "They kept us informed every step of the way. The level of documentation and regular project updates were very well received. I knew that they shared our goals and sense of urgency."

PHSO also took the opportunity to move to electronic document delivery as part of the project. Now documents such as invoices, purchase orders and remittance advices can all be sent electronically.

This will significantly reduce the amount of paper being used by PHSO, save on postage costs and remove the administration of processing paper documents.

It also means the system contains a copy of documents allowing for easier query resolution.

Query and Analysis now provides PHSO with a powerful reporting tool to analyse and understand all its finance and purchasing data. Users in the business can now gain insight at any time, drilling down to the level of detail required.

PHSO is not yet halfway through the implementation of its five year strategy but it is already seeing the fruits of its labour, including investigating almost ten times as many complaints from the public as previously.

PHSO has also been calling for a unified ombudsman to make it simpler and easier for the public to make complaints. Against this backdrop of change, the solution gives PHSO a strong footing for the future.

"We now have a platform that gives us the financial insight we require and the ability to support future initiatives," says Procter.

"TouchstoneFMS has been invaluable in helping us get to this point and I couldn't have hoped for a better partner in the process."

FIND OUT MORE:

Touchstone FMS empowers you to make informed financial decisions.

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