



# **Lawson Healthcare Webinar Series**

**October 20-24, 2008**

## Webinar Series October 20 – October 24

**Monday, October 20**

[Road to Budgeting & Planning 9.0](#)

**10 am CST**

**Tuesday, October 21**

[Getting Everyone in the ACT Through Self Service HR](#)

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**Wednesday, October 22**

[Taking Inventory of Mobile Supply Chain Management](#)

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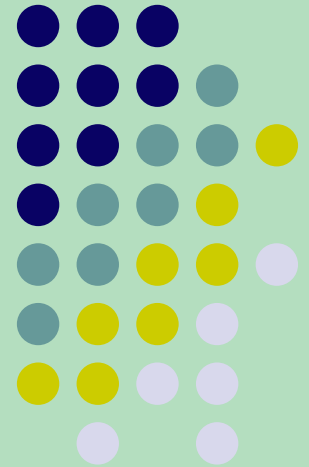
**<http://www.lawson.com/hcwebinarseries>**

# The Road to Lawson Budget & Planning at Providence

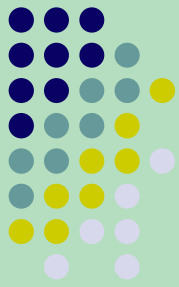
*Automating budget approval  
processes makes sense in a multi-  
facility healthcare organization*

October 2008

Providence Health & Services



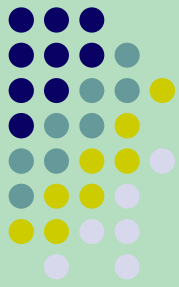
# Summary of Presentation



Providence Health & Services shares the story of their budget journey from spreadsheets to LBP.

Listen to tales from the road, including cool features in the software and feedback from hospital dept managers and budget preparers.

# Presentation Outline



- A little bit about Providence
- Why go on this journey?
- Lawson Budget & Planning Software
- Implementation Locations
- Enhancement Requests
- Lessons Learned

# **LAWSON SOFTWARE DISCLAIMERS**

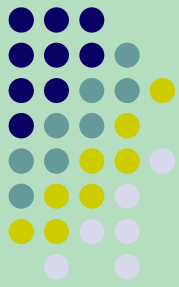
## **Disclaimer regarding future product discussion**

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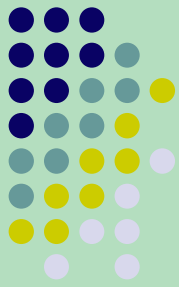
## **Disclaimer regarding use of screen shots in this presentation**

This presentation has been prepared to demonstrate a variety of ways that Lawson's software applications and tools can be set up and utilized by customers. The screen shots provided may not be standard, out-of-the-box reports, but may require your organization to engage Lawson Professional Services in order for the applications or tools to work as shown.

# Who is Providence?



- Providence Health & Services is a not-for-profit organization extending across five states, including Alaska, Washington, Montana, Oregon and California. The System operates 26 acute care medical centers and hospitals, more than 35 non-acute facilities, physician clinics, a health plan, a liberal arts university, a high school and numerous other health, housing and educational services. In total, more than 45,000 people are employed by Providence Health & Services.
- End-of-year 2007 total assets over \$7 Billion & 2007 net operating revenue over \$6 Billion (unaudited)
- Providence Health & Services in Alaska, Washington, Montana and Oregon is sponsored by the Sister of Providence religious community. In Southern California, the health ministry is co-sponsored by the Sisters of Providence and the Little Company of Mary.
- In Lawson, our regions are setup as companies and our facilities are locations within that company.
- System→Regions→Service Areas→Facilities (hospitals)→Departments

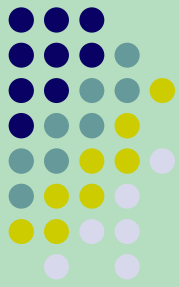


# Mission of Providence

## THE PROVIDENCE COMMITMENT

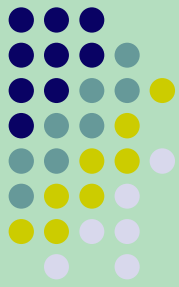
As People of Providence  
we reveal God's love for all,  
especially the poor and vulnerable,  
through our compassionate service.

# Why standardize budgeting?



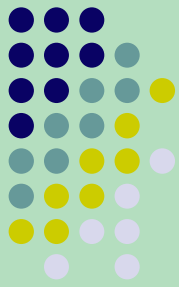
- By 2006, each Region had its own budgeting processes. In some cases, even the facility practices differed from hospital to hospital.
- Several Regions prepared budgets on hand-held spreadsheets
- Many of our facilities spend too much time researching budgets and have no clear audit trail of budget approvals.
- Dept managers complained that they submitted a budget, it went 'into the ozone', and then they were presented with a dramatically-different budget 6 months later
- OCFO decreed that entire System would go onto one budget system
- Timing of this direction coincided with Lawson's release of LBP
- Providence had a highly-successful implementation of Lawson ERP, completed at the end of 2006

# LBP, in a nutshell



- A simple application for preparing and accumulating budgets, managing an automatic approval process, and reporting the resulting budgets
- Not just for Healthcare - Lawson Software supports LBP in many industries
- LBP data loads from Lawson ERP finance modules, but does not link directly to ProvConnect/Lawson ERP

# Overview of Implementations



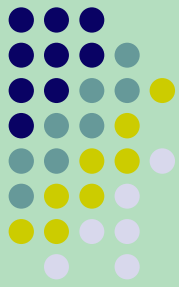
## Alaska Region

- 4 clinical sites
- 1 Regional medical center
- Over 50 dept mgrs/preparers
- Implemented LBP as 'plain vanilla' with little modification
- Early on, determined that workforce functionality would not work for AK healthcare facilities
- Budget training started in April, final budgets completed in September
- Fewer than 5 superusers/admins

## System Office (HQ)

- 2 major employee locations
- Less than 20 dept mgrs/preparers in 2007
- Plan to extend tool to another 50 mgrs in 2008
- Did not use workforce in 2007, looking forward to implementing it in 2008
- Six-week budget season
- Major re-organization of IS depts included in 2008 budgeting
- 2 superusers/admins

# Original Enhancement Requests

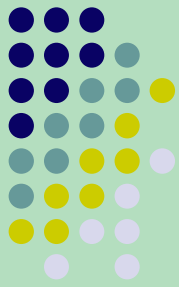


## ISSUE

- Performance issues/data loading time
- Reporting
- Security: only 2 levels of access

## SOLUTION

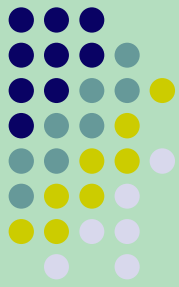
- Hypercalc due in summer 2008
- Providence hired full-time report writer for custom reports
- Excel download functionality available now
- New security in design review phase now



# Next Wave of Enhancements

- Streamline loading and global changes for LBP admin users (budget analysts in Regions)
- Comments field: standard/searchable “reason codes” for changes to local plans
- Audit trail for changes to local plans (reports for following budget approval process already included)
- Smooth interface between Lawson ERP HR data and LBP workforce feature
- Build-out of flex budgeting, and related reports

# Lessons Learned



- Budget preparers gave it very high marks!
- Early training for dept managers/budget preparers is essential for success
- On-site technical assistance (Lawson Services-recommended consultant) very worthwhile during first year of implementation
- Off-LBP worksheets are required for revenue and staffing inputs for healthcare
- Keep system stable during entire budget season
- Lawson Software is very responsive to enhancements that benefit their healthcare customer base
- Maintain balance between users requests and Lawson Software development plans for enhancements

# Questions?

For more information go to [www.lawson.com](http://www.lawson.com)  
or call 1-800-477-1357



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