



CASE STUDY

# Hospital Financial Assistance Management System Optimization

## → Challenge

The Financial Assistance team at a major medical research and treatment center faced significant operational challenges using an outdated SharePoint system. With only two team members handling ~3,600 patient applications annually, the system reached overcapacity, exceeding SharePoint's 5,000 record limit by more than 17,000 records. This resulted in broken functionality and frustrated users who were affected by limited reporting and a rigid system that couldn't scale.

## → Solution

SEI migrated the Financial Assistance process from SharePoint to a modern web application with automated workflows and status tracking. The new solution included:

- Adobe E-Sign integration for digital patient signatures
- Salesforce integration for incorporating patient financial data
- Epic integration to store documentation directly in patient charts
- Advanced reporting capabilities for program transparency and oversight

This approach not only eliminated reliance on outdated infrastructure but also introduced standardized business logic, automation, and streamlined workflows tailored to the team's needs.

## → Results

The new web application optimized efficiency, improved transparency, and created a sustainable, future-ready system that supports both patients and the Financial Assistance team. Through close collaboration, the team achieved:

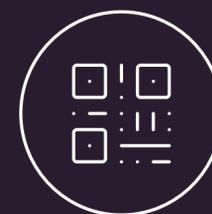
- 20% faster application turnaround time with customized workflows and automation
- Increased patient satisfaction through digital applications and electronic signature capability
- Scalability with no storage limitations, ensuring growth capacity
- Customized reporting for leadership and staff, enabling identification of bottlenecks and workflow enhancements
- Patient-centric model by consolidating data and eliminating siloed systems



Advanced Analytics



Cloud & Technology Strategies



Data Modernization



Solution Design