



“CRGroup has done a tremendous job of developing a platform that integrates all of our business systems, allowing us to efficiently process claims and serve our members faster than before .”

**Vicky Daguerre, Supervisor,
Financial Accounting**

PSAC

About PSAC

The Public Service Alliance of Canada (PSAC) is one of Canada's largest national labor unions representing more than 170,000 workers in every province and territory in Canada and in locations around the world. PSAC members work for federal government departments and agencies, crown corporations, universities, casinos, community services agencies, Aboriginal communities, airports, and the security sector among others. PSAC is headquartered in Ottawa with 23 regional offices across Canada.

Overview

PSAC transformed their paper-based, labor intensive loss of salary and expense claims processing system into an automated and intuitive process. Corporate Renaissance Group (CRGroup) was the lead consultant on this business-critical project. CRGroup developed the Finance Administration Portal (FAP), a web-based application designed to integrate PSAC's member portal, enterprise resource planning (ERP) software Microsoft Dynamics® GP™ and other organizational business systems.

Situation

PSAC represents more than 170,000 members globally under unions varying in member size with over 300 collective agreements. On behalf of their members, PSAC processes approximately 7,500 claims annually for more than 1,900 events.

In 2014, PSAC was using Dynamics GP as their ERP and an independent legacy Windows to Payroll (WTP) system along with a manual paper-based system to process loss of salary and expense claims for their members. The outdated WTP system was maintained by a sole-developer not readily available for support when needed, which created a significant business risk for the organization.

The manual process for claiming all loss of salary and expenses required members to submit carbon copy forms with original receipts by mail to the Finance Department in Ottawa. Upon arrival, the Financial Accounting staff had to verify each claim for accuracy to ensure members were receiving the correct payment based on their collective agreement and receipts. “We would ask our members to fill out a carbon copy form that would be illegible at times,” said Vicky Daguerre, Supervisor, Financial Accounting, PSAC. “Once the form was submitted, it could take between 15-20 business days to process after the information and calculations were manually reviewed and vetted.” After the verification process was complete, the cheques were mailed to the members, bringing the time consuming and labor intensive process to an end.

Solution

PSAC realized the need to take a different approach while keeping in mind their vast member base and hundreds of collective agreements. In 2012 the members voted in favor of automating the entire claims process. In 2013 a commitment was made by PSAC to move to an electronic claims submission process in order to expedite processing and payment to members. They consulted with their long-time valued partner, CRGroup, who had implemented

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Dynamics GP for PSAC in 2007 and continues to provide GP support and feature enhancements. With over 27 years of experience in financial systems, software development and implementation of complete business solutions, CRGroup was the clear choice for PSAC.

The solution needed to provide secure access to various stakeholders across PSAC, including event administrators and approvers across the Regional Offices as well as finance team members. CRGroup developed the FAP as a fully bilingual application that integrated the member expense portal and Dynamics GP. The FAP addressed the complex business requirements, rules, workflow approval routing, and calculations required to accommodate the payment rates and various entitlements specific to the large number of collective agreements. In addition to the FAP, CRGroup created an API using ASP.NET Web API and the RESTful framework to allow future back-end development growth.

The solution leveraged PSAC's existing IT infrastructure using ASP.NET MVC framework and SQL server. Likewise, the latest web development standards such as HTML5 and Bootstrap were used to ensure a responsive design and mobile compatibility.

Based on the various collective agreements covering 75% of the membership, the FAP automated the specific business rules and requirements of each agreement to eliminate the manual processes involved in the calculation and verification phase. In addition to the FAP, CRGroup deployed the Dynamics GP Canadian payroll and electronic funds transfer (EFT) modules, key elements for the project that allowed administrators to quickly transmit reimbursement to members.

"We could have originally gone with a quick fix for our issues, instead we took a look at the bigger picture and chose the best option for our members and staff," said Daguerre. The full solution significantly improved the entire organizational workflow, accuracy and effectively reduced the duration of the complete claims submission and payment disbursement process.

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Benefits

Improved Member Experience

The FAP introduced new features such as EFT and claim process tracking that enhanced member experience and satisfaction. Members are now able to submit claims electronically and are reimbursed in half the time without the necessity for receipts or any physical paper. Additional improvements such as the process tracking capabilities provide members with the ability to track the status of their submitted claims. Members gain full visibility into the process through various methods like reporting and email notifications.

Reduced the Risk of Error with Automation

Automation to the various rules and requirements from each collective agreement minimized human error by making the process repeatable without the need for manual calculations or human intervention. Issues such as collective agreement misinterpretations or illegible handwriting were eliminated from the claims process. The collective agreements from 75% of PSAC's member base are now completely automated, increasing efficiency and reducing the time taken to process claims. Items such as loss of salary, meal calculations, hotel, travel, and other entitlements are fully automated.

Decreased Carbon Footprint with Process Time Reduction

Submitting a claim and receiving payment prior to the FAP integration was a long process

lasting between 15-20 business days, requiring physical receipts and mailing logistics.

Now, claims are processed in half the time without the latter two! The decrease in processing times has allowed for claims to be processed faster while having less impact on the environment. Members have also benefited from direct deposits by obtaining their funds in days rather than receiving a cheque in the mail. By discontinuing paper use and reliance on the mailing system, PSAC has substantially reduced their carbon footprint.

Empowered the Staff

Information has become readily accessible by all stakeholders at PSAC. Claims that were once received by mail and verified manually by staff members are now easily accessed through any device, including mobile devices. The workflows built into the FAP have facilitated claim routing to the various stakeholders for proper approvals. Rather than manually verifying each claim, staff are now able to focus on value added roles such as spot checking and auditing. Along with the new focus, the staff is able to take advantage of the easily accessed information for enhanced, real-time detailed reporting to obtain necessary information. Likewise, staff are now equipped with the capability to effortlessly view trends and find anomalies or erroneous claims. The FAP also allows for the segregation and management of various roles, including event administrators, approvers, bookkeepers and financial officers.

About Corporate Renaissance Group

Since 1989, Corporate Renaissance Group has been a global provider of innovative solutions that improve business management and performance. With over 4,000 customers worldwide, CRGroup has established itself with expertise in business management consulting and software development. CRGroup delivers solutions by leveraging their expertise in Microsoft Dynamics, SharePoint, business intelligence, financial and costing principles, shared services and employee performance management. CRGroup is a part of the Microsoft Partner Network, headquartered in Ottawa, Canada, with offices throughout Canada, South Africa, India, Hong Kong and the United States.

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