



# Case Study - Client Refund Automation

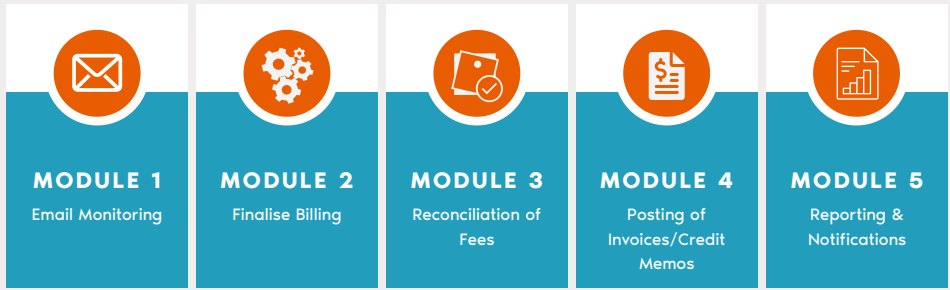
## Realise operational potential

At ProcessX we are committed to helping businesses streamline their processes and unlock their full potential by improving the efficiency and quality of operations.

Typically, as organisations grow, processes inevitably become more complicated making day to day operations difficult for both customers and employees. Intelligent automation can help to identify and dismantle bottlenecks thereby improving efficiency. The first step towards automation needs to be focused on process design and assessment. Our expert consultants evaluate your current processes and operations.

We offer advice on process improvement using lean six sigma combined with process mining, as well as on implementing robotic automation. Our team is passionate about working alongside every client individually to optimise operations. Our tailored services are unique to each of our clients, which is the only way to ensure long-term, sustainable results.

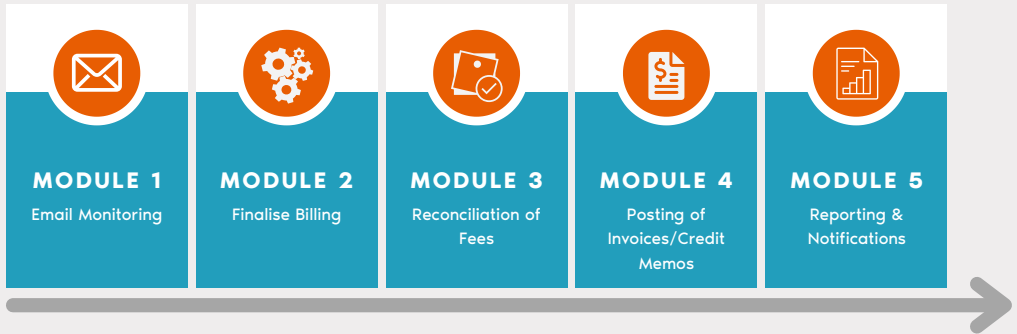




## PROBLEM

**A major ASX listed Aged Care Provider engaged ProcessX to help with conducting a process review to help with improving operational efficiency within various business units.**

The Accounts Receivable Team was spending considerable time every week on processing client refunds. This was due to a legislative requirement to ensure any client discharges are processed within 14 days. The process is heavily manual as requires a complete reconciliation of accounts for the client from their start date. The entire process is conducted on the Epicor ERP system.



## SOLUTION

The team at ProcessX engaged with the staff and identified the pain points which was around the manual nature of the process and variation due to different client arrangements. The team worked on developing a future state process that would streamline the variations and be fit for automation.

The process was optimised for a "Human in the Loop" as there were inputs/ decision making that was required. This now meant that the aspects that were manual are completed by the robot and decision making completed by a human to hand it back to the robot for further processing.

## RESULT

The automation has improved the accuracy of the process to 100% and put on path to achieve 7500 hrs of effort saving per annum. In the process the letters have now been standardised to ensure consistency in quality to the clients and improved brand. It also now ensures compliance to the legislative requirements.

- 1** Improved accuracy of complex refund calculations
- 2** Saving of 7,500 Hours Annually
- 3** On time refunds to meet legislative timelines (14 days)

ProcessX is a Melbourne-based consultancy with a specialist focus on process automation and business optimisation. We offer end-to-end process improvement and intelligent automation services, designed to help make your business more efficient and streamlined for both employees and customers/clients.

The ProcessX team has many years of cross-industry experience in service improvement and business process management across various industries, and the public sector. We specialise in business process improvement and intelligent automation in aged care, healthcare, disability care and higher education sectors.

# PROCESS MINING

# PROCESS IMPROVEMENT

# PROCESS AUTOMATION

**Discover More**  
**[letschat@process-x.com.au](mailto:letschat@process-x.com.au)**



[www.process-x.com.au](http://www.process-x.com.au)

