# CTS Billing Modernization Project

1. **GENERAL INFORMATION:**
   - Lead Agency Name: Washington Technology Solutions (WaTech)
   - Partner Agencies: L&I, DSHS, Thurston county, City of Lacey
   - Improvement Project Title: CTS Billing Modernization
   - Date Initiated: 10/14 (Ended 10/15)
   - Project Type: Agency Strategic Plan

2. **PROJECT SUMMARY:**
   - Using Technology Business Management (TBM) tool, CTS created electronic customer access to billing detail files, resulting in per month savings of:
     - 57 hours of billing coordination.
     - 6 hours submitting and handling Infra trouble tickets.
     - 20 hours of meetings between service owners, subject matter experts and billing specialists reviewing data for billing feed.
   - Leveraged TBM software system to automate 19 of 30 manual spreadsheet processes making detailed billing reports available through customer self-service.
   - Eliminated duplicate spreadsheets and manual tracking process.
   - Resolved multiple billing errors associated with manual spreadsheet.

3. **PROJECT DETAILS:**
   - Identify the Problem:
   Customers:
     - Had only manual access to billing files with potential for inaccurate detail.
     - Experienced numerous billing cut off and release dates resulting in confusion regarding duplicate billing.
     - Received billing language that did not match the state enacted budget.
     - Got little access to billing details; only receiving a dollar due amount.
     - Had no transparency into their agency's IT-related expenditures.
     - Were unable to easily answer constituent questions or address public disclosure requests.
     - Sometimes received boxes of billing files.

4. **PROBLEM STATEMENT:**
   - CTS did not have an electronic Accounts Receivable and Accounts Payable system to accommodate the formation of WaTech. There was no customer self-service or electronic access to agency invoices.

5. **IMPROVEMENT DESCRIPTION:**
   - Customer electronic access to billing files and improved detail to IT expenses resulted in improved customer satisfaction. There is better transparency for agencies to see how they spend IT dollars.
   - Fewer mistakes are made as a result of the electronic process.
   - Billing files language now matches the state enacted budget language.
   - Public disclosure requests and constituent questions for IT-related expenditures can be more easily addressed.

6.  **CUSTOMER INVOVLEMENT:**
    *   Customers tested all new electronic downloadable billing detail files to ensure there is minimal need for trouble tickets or manual copies.
7.  **PROJECT DETAILS:**

| Improved process as measured by: | Specific results achieved: | Total Impact: | Results Status: |
|---|---|---|---|
| **Cost** | • Avoiding costs inherent within manual systems | $500,000 saved annually | **Final** |
| **Quality** | • More accurate detail without manual entry<br>• Elimination of duplication | • Automation of 19 out of 30 manual processes<br>• Fewer mistakes are made as a result of the electronic process<br>• Billing files language now matches the state enacted budget language | **Final** |
| **Time** | • 57 hours of billing coordination<br>• 6 hours submitting and handling Infra trouble tickets<br>• 20 hours of meetings between service owners, subject matter experts and billing specialists reviewing data for billing feed | • 83 staff hours saved per month, or<br>• 996 staff hours saved annually | **Final** |
| **Customer Satisfaction** | • Customer self-service on electric platform – no more manual billing invoices<br>• No more confusion over multiple bills<br>• Resolution of billing errors from manual process | • Public disclosure requests and constituent questions for IT-related expenditures can be more easily addressed<br>• Customer tested and approved the new billing process | **Final** |
| **Employee Engagement** | • Finance staff collaborated with multiple customers on this project | Employees report feeling valued and listened to as well as pleased their customers have and easier | **Final** |

| | | and quicker billing solution | |
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8. **CONTACT INFORMATION:**
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9. **OPTIONAL VISUALS #1:** The visual below shows how the ABS Invoice language now matches that of the state enacted budget.  Customers can now see at-a-glance that their billed amount matches the amount in the enacted budget.



OPTIONAL VISUALS #2: Finance celebration for launch of new billing system