



## CASE STUDY

# KAISER PERMANENTE

With powerhouse automated workflows, Kaiser Permanente gains full control and visibility into four of their most critical business processes.



**INDUSTRY**  
Healthcare

**EMPLOYEES**  
304,874



## Overview

Kaiser Permanente is an American integrated managed care consortium made up of three distinct but interdependent groups, dedicated to offering the most efficient and effective patient care possible. Together, Kaiser Foundation Health Plan, Inc. (KFHP), and its regional operating subsidiaries Kaiser Foundation Hospitals and regional Permanente Medical Groups is one of the nation's largest not-for-profit health plans, serving 12.4 million members.

## Problem

Serving over 50 local markets across the United States of America, Kaiser Permanente is tasked with organizing critical financial processes amongst three interdependent groups positioned in geographically diverse regions. Processes like evaluating requests for equipment and capital, or the reorganization of staffing resources were riddled with inefficiencies, leading to protracted approval and review timeframes, frequent miscommunication, and a severe lack of visibility.

Several of Kaiser Permanente's internal processes began with a spreadsheet, sprinkled with cells carrying complex instructions. Tricky templates made it hard to identify errors along the way as team members manually passed spreadsheets up the food chain, frequently moving data back and forth between users. The informal structure made it challenging to pinpoint a pending project's precise progress, leaving unchecked files languishing in inboxes. Clunky spreadsheets were challenging to decipher and lacked a crystal clear audit log.

### Annual Revenue

\$84.5 billion (2019)

### Location

United States of America

### Users & Cases

320 users

5,000+ cases per year

### Highlighted Processes

Full Time Equivalent (FTE) Requests to hire or allocate staffing resources: **1225 cases**

Recharge Agreements to assess and process budget requests by subsidiaries: **81 cases**

New Equipment requests for various entities to request new equipment replacements which are routed to the appropriate management groups for approval





## The Solution

Kaiser Permanente realized that the informal structure needed to change, so they turned to ProcessMaker. The ProcessMaker professional services team custom built three new workflows to eliminate the manual tasks beleaguering the productivity of Kaiser Permanente's financial services team. Using tailored workflow automations, Kaiser Permanente transformed four of their most important financial processes into automated workflows that now run more than 5,000 cases annually.

## The Value Created

ProcessMaker provided the building blocks for Kaiser Permanente to introduce much-needed structure into their financial processes. Instead of wading through unnecessary manual tasks, ProcessMaker cut down the number of steps required for a request to move from submission to approval. Automation helped simplify multi-tiered approval processes, by dynamically adjusting the management approval requirements depending on the type of request.

Using ProcessMaker, Kaiser Permanente acquired a new level of visibility into their processes. Employees could easily track the progress of a pending request and identify the exact reason behind any bottlenecks or delays. New automation tools created a precise audit log, noting and recording all changes along the way.

Submissions containing errors were instantly flagged by the new system. Without the need for requests to take pit stops for a manual review of each independent cell and step, submissions moved more smoothly throughout workflows. Kaiser Permanente was able to reduce the amount of time spent on each request, enabling their teams to quickly disburse much needed capital and equipment to healthcare facilities nationwide.



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## About ProcessMaker

ProcessMaker is low-code BPM and workflow software. ProcessMaker makes it easy for business analysts to collaborate with IT to automate complex business processes connecting people and existing company systems. Headquartered in Durham, North Carolina in the United States, ProcessMaker has a partner network spread across 35 countries on five continents. Hundreds of commercial customers, including many Fortune 100 companies, rely on ProcessMaker to digitally transform their core business processes enabling faster decision making, improved compliance, and better performance.

**For more information, visit us at [www.processmaker.com](http://www.processmaker.com)**