

# Independence Community School District Automates AP Invoice Processing



## CHALLENGES

Independence Community School District (ICSD) is a public school district located in Independence, Iowa serving approximately 1,400 students in PreK-12.

ICSD is using Software Unlimited Inc.'s (SUI) School Accounting System which has helped streamline their accounting processes significantly. However, Janet Grafft, who is Director of Finance with a background in process improvement, understood the significance of continuous evaluation and adaptation of improved workflows. She realized their manual process for managing AP invoices was inefficient and time consuming.

The process to get paper invoices into the system required someone to scan invoices, find them on the hard drive, and then upload one invoice at time into SUI. This could take anywhere from 3-5 minutes per invoice. When processing 200 invoices per month, that time adds up. Also, vendors would often email invoices to someone that was no longer with the district. Vendors normally send invoices from a DO NOT REPLY email address, so they are not getting the emails bounced back to them. Vendors were inquiring why they hadn't been paid. "And then I have a Board member asking why we are paying something that's three months late," says Janet.



## SOLUTION

ICSD implemented K12Docs+, the cloud-based document management module with AI-powered capture to automate the scanning-to-indexing-to-filing process.

Invoices are now either being emailed directly to an AP email account or scanned and forwarded to that email address. The system then uses AI to capture important indexing data to automatically file the invoices in the K12Docs digital filing cabinet. As transactions are entered into SUI's School Accounting System, the program seamlessly associates the invoice with the AP transaction and vendor. Anytime an invoice needs reviewed at later date, it's just an icon click away.

## THE RESULTS

**Achieved 80% reduction in the time it takes to scan, index, and file.**

After implementing K12Docs+, the benefits became immediately apparent. "It's just made everything so much quicker and smoother," states Janet. "What used to take up to 5 minutes per invoice now only takes about 1 minute."

Automation is eliminating the biggest bottleneck by removing the reliance on individuals. "It's always the same - the one invoice you actually need is the one that hasn't been scanned", says Janet. "Our school board appreciates the automated system not just for minimizing human error and accelerating the payment process, but also because it frees us up to focus on more impactful work."

## WHAT'S NEXT

ICSD is continuing to explore ways to leverage this technology further throughout the district such as the automated capture and filing of teacher contracts and other HR records.

They also plan to train secretaries over the summer when parents demand less of their time. Janet added, "I'm excited to push invoice approval responsibility out to the various departments as part of the automated workflow. This will be a great way to show auditors our internal controls."



**Even though we are just beginning to take advantage of all the features available in the K12Docs+ system, we are already way more efficient. If we stopped today and didn't implement any of the rest, I would still be happy with what we've done.**



*Janet Grafft  
Director of Finance, Independence Community School District*