

CASE STUDY



BACKGROUND

Grace Healthcare, LLC is a privately owned organization that provides support services to 24 skilled nursing homes, assisted living, and rehabilitation facilities across the United States. As a home office, managing these facilities requires extensive travel along with administrative upkeep of travel expenses.

Historically, employees were solely responsible for identifying a travel booking site, reserving their own flights and hotels, and paying for these expenses with their own funds for later reimbursement. The expense reports were submitted each month via hard copy with paper receipts attached as back up. This process became arduous for travelers trying to keep track of receipts as well as time-consuming for the AP team whose job it was to manually reconcile expenses.

Grace Healthcare tried a solution for travel bookings and expense reporting that resulted in too many new issues including travelers not having access to payment details, complications at hotel check-in, and poor customer service.

Additional pain points included payments for hotels when travelers arrived and tried to check-in. Most of the time, travelers were required to obtain a credit card authorization form from the AP team prior to their hotel stay. Without the form, check-in at the hotel would be denied. This became especially problematic when it occurred after normal business hours when the AP department was closed and unable to email or fax a forgotten credit card authorization form to the hotel. Additionally, Grace Healthcare often never received the receipts for hotel stays and had no backup for the charges made on credit card statements.

"We really needed to find a way to be more hands off with the travel piece. After all, we're accountants, not travel agents!" – Shelby Carden, Director of Accounting.

They had already experienced success with CSI's accounts payable (AP) platform, CSI Paysystems, so they decided to see what CSI Travel could do. The promise of a platform that could combine all the essential elements of travel booking, payments, and expenses, along with customer service that was already impressing them on the AP side, inspired them to take the leap.

SOLUTION

CSI Travel provides real-time access to all published and negotiated travel rates courtesy of AmTrav's online booking tool which is seamlessly integrated with the CSI Travel payments platform. AmTrav also acts as the Travel Management Company (TMC) so all Grace Healthcare travelers can use the booking tool to make reservations and pay with CSI's virtual credit cards. Virtual card payments are

automatically accessible via the CSI Go mobile app, giving travelers the necessary visibility into trip details and immediate access to credit card authorization forms directly from their phone. These forms can be emailed to the hotel right from the app during the check-in process if necessary. The CSI Travel and AmTrav platforms are also fully integrated with Certify, another robust travel program that automates the final expensing process.

"I was very impressed with the demo we received on our first call with CSI. The integration and training that followed was thorough and extremely beneficial but also exceptionally quick and painless. We were up and running on the travel side in no time at all!" – Shelby Carden, Director of Accounting.

Grace Healthcare worked with Certify to get all expenses set up and mapped correctly for their general ledger, and then handed it off to the Certify team who did all of the leg work. This was in stark contrast to their previous experiences in which Grace Healthcare was required to do all of the time-consuming set up in-house.

"The way CSI Travel integrates with both AmTrav and Certify creates the perfect trifecta for travel booking, payments, and expense management in one easy to use platform."

RESULTS

With CSI Travel, all airfare is booked on a ghost card through AmTrav, all car rentals go through a direct bill process with Enterprise, and hotel stays are booked with a virtual card through CSI. The staff accountant who processes all AP receives hotel receipts directly to their email when the traveler checks out and can reconcile in a fraction of time with Certify.

"The ease of use is remarkable and all of our pain points, aside from lack of education at the hotel front desk, have been eliminated on both the traveler and AP side."

To other companies looking for travel solutions, Shelby says, "Go for it! There isn't much to lose, and so much to gain, including a monthly cash rebate on virtual card spend!"