MST

Transforming Expense Management for the US Senate

Government
5500+ Senators and senate staffers

Software
MST® Applet eViewer®
SharePoint® Online

Services
MST Technical Account Manager
(TAM)

MST Consulting

The United States Senate is a crucial component of American democracy, tasked with enacting legislation, overseeing governance, and representing the interests of the states. With a wide range of responsibilities, the Senate operates with an annual budget amounting to billions of dollars and employs over 5,500 people, including Senators and their staff. Managing the day-to-day operations of such a large and complex institution requires a high level of efficiency, accountability, and transparency, especially in financial management.

The Challenge

The US Senate encountered significant challenges in managing its expense processes, which relied heavily on traditional, manual, and paper-based methods. The limitations of this outdated system led to several issues:

- **Cumbersome Filing and Tracking**:

  Filing, tracking, approving, and reimbursing expenses for Senators and their staff was a labor-intensive and time-consuming process. This dependence on physical paperwork created unnecessary delays and inefficiencies.

- **Compliance and Accessibility Issues**:

  Expense records needed to be readily accessible for audits, compliance with government regulations, and responses to information requests from government departments and the public. The existing system made these processes cumbersome and slow, risking non-compliance.

- **Escalating Storage Costs**:

  The physical storage of old expense reports consumed valuable space and resulted in rising costs, further straining the Senate's resources.

- **Risk of Errors**:

  The manual nature of the process increased the likelihood of lost or mishandled expense reports, undermining operational reliability and creating potential transparency issues.

These challenges highlighted the urgent need for a modernized system that could enhance efficiency, reduce costs, and ensure compliance with transparency and accountability standards.

"Deloitte and MST provided a transformative solution that streamlined our financial expense management, improving efficiency, transparency, and compliance. Their expertise enabled us to automate manual processes, enhance financial oversight, and ensure greater accuracy in expense tracking and reporting. The implementation was seamless, reducing administrative burdens while increasing operational effectiveness. Thanks to Deloitte and MST, we now have a more agile and accountable system that aligns with our mission to serve the public effectively."

Michael Contillo
U.S. Senate, Sergeant At Arms
Technology Development Services

Solution: SharePoint + eViewer Implementation

To address these critical issues, Deloitte collaborated with MS Technology to develop and implement a customized web-based expense management system for the U.S. Senate. The solution was built using Microsoft SharePoint and MS Technology's eViewer platform, ensuring a robust, secure, and user-friendly experience.

Key features of the solution included:

- **Integration of eViewer**:

  Enabled staff to view, edit, annotate, and approve expense documents in a secure and web-based environment without needing additional software installations.

- **Digital Expense Filing and Tracking**:

  Senate staffers gained the ability to file their expenses digitally, capture and upload receipts, and track the real-time status of their reimbursement requests. This eliminated the need for physical paperwork and streamlined the entire process.

- **Custom Approval Mechanisms**:

  The system incorporated customized SharePoint Site developed by Deloitte, workflows, and tools, such as digital stamps for approving or rejecting expense claims. This provided processors with a seamless way to manage approvals efficiently while maintaining accurate records.

- **Centralized Storage and Archiving**:

  All expense reports were securely stored in a centralized digital repository. This allowed staffers, administrators, and processors to easily query and retrieve records as needed. The system was designed to accommodate high-volume data, ensuring scalability for future needs.

- **Automated Reporting Capabilities**:

  The solution featured advanced reporting tools that enabled the automatic generation of quarterly and year-end financial reports. These reports were essential for accounting, transparency, and ensuring compliance with oversight requirements.

- **Digitization of Legacy Records**:

  Historical expense reports were scanned and archived within the system, significantly reducing the Senate's dependence on physical storage and lowering associated costs. This effort also ensured that older records could be quickly accessed for audits or reviews.

The Results

The implementation of the modern expense management system brought about transformative results for the US Senate, effectively addressing long-standing issues and creating significant value. Some key outcomes included:

- **Substantial Cost Savings:**

  The Senate achieved annual savings of over $100,000 by reducing labor and physical storage costs. Additionally, digitizing legacy records saved an extra $50,000 per year, further alleviating budget pressures.

- **Enhanced Productivity:**

  Productivity in managing expenses improved by an impressive 250%, enabling staff and processors to complete tasks more quickly and efficiently.

- **Faster Processing Times:**

  The service-level agreements (SLAs) for expense approvals were reduced from 10 business days to just 4, ensuring faster reimbursements and better overall efficiency.

- **Elimination of Errors:**

  The incidence of lost or mishandled expense reports dropped from 5% to virtually zero, significantly enhancing the system's reliability and improving trust among stakeholders.

- **Improved Accessibility and Compliance:**

  The retrieval times for past approved expense reports improved dramatically, with SLAs reducing from 10 business days to just 2. This enhanced accessibility ensured compliance with audit requirements and improved responsiveness to information requests from governmental and public entities.

- **Operational Streamlining:**

  By digitizing processes and automating workflows, the Senate was able to shift resources away from administrative tasks, allowing greater focus on its core mission of governance and legislative responsibilities.

Benefits of SharePoint + eViewer for Government Agencies

The benefits of this initiative, which include cost savings, productivity improvements, reduced errors, and enhanced compliance, clearly demonstrate its significant impact. The US Senate's commitment to modernizing its operations sets a strong example for other government agencies that aim to improve efficiency and accountability in public service. The successful implementation of eViewer highlights the following benefits:

- **Real-Time Annotations and Approvals:**

  Streamlined approval processes with digital stamping and markup capabilities.

- **Scalability and Future Readiness:**

  A flexible solution capable of handling increasing volumes of government documentation.

- **Audit and Compliance Readiness:**

  Ensured compliance with government regulations through a transparent and efficient document management system.

Conclusion

The modernization of the expense management system for the US Senate marks a significant achievement in improving operational efficiency, reducing costs, and ensuring transparency. By utilizing advanced technology and tailored solutions, Deloitte and MS Technology effectively tackled the Senate's challenges, transforming a cumbersome paper-based system into a seamless and fully digital process. This case study serves as a prime example of how eViewer can help government institutions optimize document management, reduce costs, and improve transparency, setting a benchmark for digital transformation initiatives in the public sector.