

Cleargistix

CLEARGISTIX MAKES PAYROLL AND BILLING MORE EFFICIENT AND MORE ACCURATE

Complex payroll processes and billing requests from customers are readily accommodated

INTRODUCTION

Offshore Technical Compliance (OTC) based out of Covington, Louisiana provides digital pressure testing, regulatory compliance inspections and verification of compliance services with a large part of its services offshore. This is a case study of how Cleargistix helped to address the opportunities for OTC to improve the flow of collecting payroll information, revenue data and job details from the jobsites, moving away from paper and email reports to the Cleargistix digital way.

For ticketing and job tracking on paper-based forms, offshore service work differs from the land version in that most tickets are not approved by the client and turned in at the end of each day. Jobs can last from two days to two weeks or more, which can make collecting details of the job difficult.



The Problem

On the client facing side, OTC specializes in helping offshore oil and gas producers move from paper reporting to digital systems. In the back office, OTC was using hand-generated tickets that were turned in after two-to-three-week hitches offshore. While they did not suffer from lost tickets, as is the case for many paper-based companies, management did find issues with waiting for days or weeks to get data for billing, payroll and operational needs. On-the-job issues or questions were often not discovered in a timely fashion.

According to Operations Coordinator Matt Billeaud, through whom most of the paperwork flowed, “We knew our system could improve because it was on paper, which meant we were waiting for the paper forms to come into the office. This caused our payroll processing to be really sluggish. Timesheets were coming in over email on an Excel spreadsheet making the payroll process very manually intensive.”

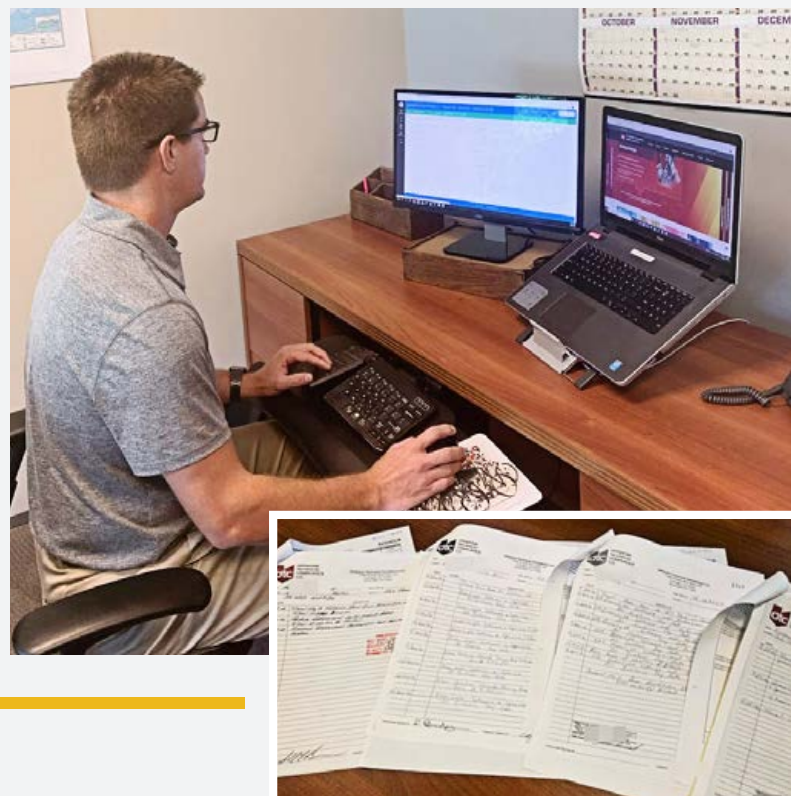
OTC’s Field Experts filled out separate time and expense reports for payroll and for job tickets for invoicing. Hand-written job tickets caused Billeaud and other managers to spend hours deciphering and verifying data before entering it into QuickBooks for billing, payroll and reporting. “It became very difficult to make sure all of the information was collected and tracked properly and to match payroll and billing numbers,” said Billeaud.

Deciphering handwriting and wording on each ticket required extensive interpretation skills—and a lot of time. “When you’re reviewing someone’s hand-written notes, you have to be able to interpret what they intended to write. They might not even put the right verbiage.”

Because of that, “You have to have a lot of checks and balances to catch errors,” he said. “You have to train people at different points of the process to look for certain issues and to double check work done by others. This is especially true because you have both payroll and billing information for the same job. Those have to match and be accurate or you have a real problem.”

Reconciling payroll and billing data was time-consuming, cumbersome, often requiring calls, texts or e-mails to Field Experts on the day of payroll.

Compounding the challenge of matching invoicing documents to timesheets was the fact that OTC can provide a variety of services to a client. On a job where more than one service may be performed, charge lines and payroll types will be different. A single job ticket or timesheet often includes two to three different charges for various types of work. The job time recorded on each form must be recorded accurately and match up between invoicing and payroll. Billeaud reports that payroll alone was cut from 40 hours over two weeks to 20 hours over two weeks using Cleargistix.



/ THE MOMENT OF DECISION /

The paper-based workflow functioned better for OTC than it does for most, but its delays and labor intensity made it very inefficient and took time away from Field Experts providing operational data to the office. The irony of the gap between their advanced field technology and their paper-based flow process in the office suddenly became clear to company leadership.

Company CFO/CAO William S. Sheffield recalled, “We realized that we were helping our clients move from paper to digital solutions for accuracy and time efficiency. Yet internally, we were using paper for our own time tracking and billing. That is where we scratched our heads and said, ‘We’re a technology company helping clients move into the digital age, while we’re still using paper for our own back office work.’ That’s what prompted us to look for a solution that would help us minimize paper.”

OTC needed to get data in real time in order to manage field operations more efficiently. They needed to eliminate redundancies in separately tracking invoicing and payroll tickets. They also needed to do away with inefficiencies caused by writing, deciphering and then having to match both tickets and time and expense reports.

/ THE CHOICE /

As OTC’s management team considered its options, fate took a hand. Sheffield met Cleargistix CEO Steven Toups at a conference. Learning what Toups and Cleargistix could do, Sheffield invited Toups for a presentation. OTC management decided Cleargistix could help bring about the changes they needed.

/ THE PROCESS /

OTC wanted to rollout Cleargistix in a controlled manner for the benefit of the users and its budgeting processes. To do that, they added features incrementally. “Our business case for wanting to make a budget for digitizing through Cleargistix was really on the back end more than for our Field Experts. It’s definitely a savings because it’s done away with all the duplicate processes,” said Sheffield. And it did also benefit the Field Experts as well.

Due to the multi-tiered pricing complexity of OTC’s payroll and billing systems, the company wanted to ensure Cleargistix was configured to handle the complexities of its business processes and provided several suggestions to the Cleargistix Team for enhancements. OTC thus began by using Cleargistix just for dispatch, inputting and tracking data for each job. This six-month starting period also allowed OTC’s users to become familiar with the new procedures as they were added.

Next, they added the ability to make daily updates, but without tracking charges.

“Then we added charging,” Billeaud continued. “So we started adding daily charge lines to the tickets daily and getting signatures at the end of the job using Cleargistix. Cleargistix built a PDF report that collected all of the information from each job for signature from the client.”

Doing periodic tickets instead of daily tickets, is another option that sets OTC apart from onshore service companies. With most jobs taking days or weeks, OTC does not require a “company man” to approve tickets every day, letting them wait until the job is completed to gain the appropriate approvals.

Since OTC was the first Cleargistix client to need something other than a daily ticket sign off, Cleargistix built a new module to accommodate their periodic ticket approval needs.

The list of the approximately 80 charge lines an OTC Field Expert has available onsite is loaded into Cleargistix with the proper billing amounts for the customer and payroll classifications for each selection. Listing tasks allows Field Experts to choose properly titled descriptions of work from a menu instead of hand-writing accounts of the work provided. Cleargistix worked with OTC to maximize the information in the solution while minimizing the amount of time it took to capture the information.

Cleargistix allows OTC management to confine the options to a short list (usually 6-10 options) of charge lines likely for any single assignment, further reducing the chances for field entry errors. Billeaud explained that listing all options on every job gave opportunities for too many errors as experts tended to click on the wrong option, which would slow the approval process at the end of the job. Billeaud indicated, "It's one of our ways to provide clear information—here's what applies to you."

/ FIELD BENEFITS /

Before Cleargistix, OTC Senior Field Expert Evan Smith spent an hour at home after each job building his payroll report and sending in the final job report via email. He made separate entries for job reporting.

Sometimes, several days later, the office would call for clarification about certain jobs, which would require Smith to go back through notes to verify the information. Cleargistix allows Smith to enter data once, at the end of each shift, in about five minutes time. "Ninety percent of the time, I have everything already scanned and uploaded to Cleargistix before I leave the job." And if needed, Smith can quickly finish the details when he returns to shore.

As part of the initial Cleargistix field trial, Smith suggested changes such as the addition of the comment field and the creation of an offline version to allow data entry when internet service is not available. The offline version saves the data, with an option of manual or automatic uploading when the device returns to a Wi Fi signal.

Barry Chilton is another Senior Field Expert who is excited about Cleargistix. While greater efficiency for OTC is important, there are numerous the client-facing benefits as well. "The ability to not hand-write the tickets is great for two reasons," he said. "Number one, it looks very good to the customer, and second, it saves a lot of time on our end."

Cleargistix achieves those time savings by automatically generating daily reports and tickets, which is what Chilton appreciates most about the software. "Some offshore clients require daily reports from everybody, and some require reports weekly. Before Cleargistix, we had to sit down at the end of the day and write out a report of what was done throughout the day," he said. "I still enter information into Cleargistix, but it quickly generates the report and sends it automatically to everyone who needs it."

He continued, "It's the same way with the ticket at the end of the engagement—saving me time with every one of those that I do."



The Result

Cleargistix allows a single entry of information to be used for both invoicing and payroll. This eliminates several redundancies: copying data off the handwritten reports into a spreadsheet; taking billing and payroll off the spreadsheet separately, and manually creating separate pdfs for each.

With those steps gone, the review, invoicing and payroll processes are much faster and simpler.

Possibly the biggest time and energy saver is the fact that Cleargistix eliminates the need for Billeaud and his department to scrutinize handwritten reports to understand what was done and whether there are questions to be answered. Cleargistix includes a comment section that allows Field Experts to add details and expand on the provided list of options.

Since OTC has a large group of possible payroll classifications for any job, Cleargistix is configured to add codes in the charge lines that indicate the payroll class for the job.

Billeaud explained, "In reviewing the ticket now, we only need to look at key points to verify that the job and the payroll codes match instead of looking at every line. Our review of the information is much faster, more accurate, and it's less mentally taxing. So when Field Experts create a charge, Cleargistix automatically processes payroll. I can approve billing and payroll at the same time."

The amount of time saved is clear. "Managing payroll through Cleargistix is so much smoother" than before, cutting the hours required in half, from 40 hours per pay period (two weeks) to 20 hours every pay period.

Making corrections from daily updates instead of weekly reports is another efficiency key. "It was huge, how much time we would spend on payroll day correcting things that now, with Cleargistix, were fixed 10 days ago," said Billeaud. "Instead of multiple inputs, each piece of information is input to just one place, from which it is sent to all appropriate parties for review."

"Managing payroll through Cleargistix is so much smoother"

OTC Vice President of Operations Laura Havrylkoff agrees. "Because information goes in daily, at payroll time we're not backtracking and chasing people down for receipts. We can follow those on a daily basis instead of after a job. That's a big deal with Cleargistix.

"Before, when a Field Expert came in, they would turn in their signed field ticket with all their documentation. A lot of times, something was missing or the time sheets didn't match up with the job ticket," requiring time and good memories to get them fixed.

Single point data entry also benefits OTC's Tech Support group because, in that department, "Supervisors review the operational notes each day," Havrylkoff said, and they are aware of the job details and can address any questions.

If Field Experts are upstream in this process and Billeaud/Havrylkoff are midstream, OTC controller Joey Briggs is downstream, receiving the end result of everyone's processing. He oversees the invoicing and payroll outputs. Cleargistix improves efficiency and accuracy for him as well.

"I import data into Quickbooks in lieu of manually inputting timesheets," he explained. "Matt creates each job in Cleargistix, the Field Experts add the data, then Matt and Laura verify data in the program each day. At end of every pay period, Laura exports the numbers [from Cleargistix] into an Excel file, and emails it to me. From there, Cleargistix lets me easily import all the timesheet data into Quickbooks."

Before Cleargistix, "It was a four-hour ordeal between me and another employee to manually enter all these timesheets for around 20 employees. Now, I get the Excel file from Laura and it's about five minutes to upload. By the time it gets to me, one or two people have already reviewed it, so it's accurate and there's no fat-fingering of data entry," Briggs said, saving OTC about 200 hours per year just in keypunching payroll.

/ REMOTE OFFICING IS BETTER THIS WAY /

With remote officing probably here to stay, in at least some form, moving away from paper tickets is a must. Cleargistix helps Billeaud in that area every week.

He said, “I don’t have to be in the office to review payroll and charges or print up billing to make sure they’re charging everything properly. When they push a ticket to me at the end of the day I can check everything when I need to where ever I am. If some of their data does not look right, we can address it then and there—we don’t have to go back a week or more to remember what happened.”

“Through the weekend I’m able to look at their daily updates and compare them in the same view,” Billeaud continued. “Before, we had an email update each day and at the end of the job came the final ticket. At that point we had to pull that email up and compare payroll to charges. We had to check boxes day by day. Now, I pull up Cleargistix, I look up their daily report, it shows their job details including the pertinent technical information, their activities, time stamps and charges. If it lines up, we’re done. If not, we can address it immediately while it’s fresh on everyone’s mind.” There is no need to wait for payroll day.”



CLEARGISTIX CAN-DO SERVICE

Billeaud, Havrylkoff, Briggs and Sheffield were all very pleased with Cleargistix’s willingness to create new functionality to fit their needs all along the way—and continuing on. Havrylkoff said, “We started with the basic features then thought, ‘It would be nice if it did this.’ And we’d come up with specific ideas.

“When we had a list of things, Cleargistix would send someone to the office to discuss our options. We’d ask if it could do certain things and they’d often say, ‘Not yet, but we’re working on it’. They were very good in working with us and adding features. They’ve been especially good at adding and developing new reports—some of which are based on what our clients want from us. They’ve always been very responsive.”

That can-do service continues as OTC continues to add features for their own benefit and that of their customers. “This is very much an ongoing back-and-forth between us, our clients and Cleargistix as they help us improve our systems,” Havrylkoff said.

Smith and other field technicians found Cleargistix willing to make significant changes, including the addition of a comment field and the creation of an offline version, to accommodate OTC’s unique requirements.

“They’ve always been very responsive.”

Conclusion



As an offshore service company, OTC’s Field Experts sometimes work long tours, requiring end of job tickets only after a few days to 2-3 weeks in many cases. Because their needs were different, they needed ticketing software that would accommodate their needs, something no off-the-shelf package could begin to accomplish.

The standardized information in **Cleargistix** removes confusion and legibility issues, streamlining the dispatch and reporting processes.

With a single point of data entry eliminating previous redundancies and real-time information entry in the field allowing real-time reviews and adjustments, Cleargistix has cut processing time in half for office personnel from 40 hours per pay period to 20 per pay period and by much more for Field Experts from an 30-60 minutes per day on the job to five minutes per day on the job.

The configurability and flexibility built into Cleargistix automatically manages complex billing and payroll functions, giving OTC real-time information on jobs and workflows and the information to meet its customers increasingly complex billing requirements.

Cleargistix’s team was happy to create new functionality and updates that worked for OTC’s unique situation. And because of the quickly evolving industry situation today, Cleargistix is happy to keep the updates coming whenever needed.

Perhaps the biggest benefit to OTC as a result of its implementation of Cleargistix is peace of mind as Matt Billeaud put it, “Everybody has more confidence in the information and we don’t have to worry about it as much.”

Saves Costs and Time

Invoicing Flexibility

Creates Payroll Information

Expedites Information Flow

For more information, contact Cleargistix at info@cleargistix.com or 985-206-9544.