

## CASE STUDY

# HeartFlow - Automating Rebates for Accurate and Timely Calculations



## ABOUT HEARTFLOW

HeartFlow is a leading global medical technology company revolutionizing cardiovascular disease diagnosis and treatment with its cutting-edge approach. Backed by an intellectual property portfolio of over 400 worldwide patents, HeartFlow has secured clearance in the United States, Canada, Europe, and Japan, fueling its rapid global expansion.

To further enhance patient care, HeartFlow introduced HeartFlow One. This service allows healthcare providers to perform as many non-invasive coronary artery disease scans as required within a set period. As part of this initiative, the company launched a rebate program to encourage adoption and improve patient outcomes.

Recognizing the complexity of managing rebates, HeartFlow partnered with SolveXia to automate the process. This collaboration reflects HeartFlow's commitment to continuous innovation and strategic partnerships that drive efficiency and better healthcare solutions.

## THE CHALLENGE

Rebate agreements for HeartFlow One are made with Systems (such as hospital networks) that include multiple Sites (such as specific hospitals, clinics, etc.). To ensure rebate rules are applied correctly, any rebate management solution must support these complex customer hierarchies by linking Sites to their parent Systems.

The solution also needed to be scalable to accommodate a growing customer base and flexible to adapt to changing rebate rules. HeartFlow required timely, efficient and precise rebate calculations to ensure compliance with contract agreements and minimize administrative effort.

## SOLUTION

HeartFlow partnered with SolveXia to automate its rebate process, seeking a solution that offered flexibility in handling its specialized calculations and rules. The solution seamlessly ingests key data through file uploads, SFTP, RESTful API, and integrations with HeartFlow's platforms.

By combining this data with predefined rebate rules, the solution determines eligibility, calculates rebate amounts for each site, and cross-checks aged receivables to ensure invoices have been paid.

The system generates detailed reports, seamlessly exports credit memos into NetSuite, and flags ineligible sites due to unpaid invoices. Fully integrated with NetSuite, Amazon Redshift, Salesforce, and Domo, the solution ensures that the right teams have timely access to critical rebate data.

The solution also empowers staff with intuitive workflows to manage customer hierarchies and rebate rules, enhancing accuracy, compliance, and efficiency.

*"HeartFlow evaluated several rebate solutions, but found many lacked the flexibility and capabilities we required. SolveXia emerged as the ideal partner to navigate the complexities of the evolving FFrcT rebate landscape."*

**Dominic Roybal**

**Senior Finance Manager: Systems & Analysis**

## KEY RESULTS AND OUTCOMES

By leveraging SolveXia's automation platform, HeartFlow streamlined its rebate process, eliminating the need to hire additional team members. A single business user can easily manage the entire rebate program, driving operational excellence.

With this scalable and adaptable solution, HeartFlow seamlessly supports the growth of its rebate program while ensuring accuracy, compliance, and strong customer partnerships. Rebates are calculated precisely, aligning with contract agreements and fostering trust with healthcare providers.

Encouraged by the success of this automation, HeartFlow is now looking to use SolveXia to streamline additional processes, including commissions and reconciliations.

*"Throughout our partnership, SolveXia has consistently delivered prompt and reliable support, even when faced with complex queries. They have been instrumental in developing and implementing our rebate management process."*

**Dominic Roybal**

**Senior Finance Manager: Systems & Analysis**

## KEY METRICS



80,000 TRANSACTIONS PROCESSED DAILY



440 SITES SUPPORTED



2 FTES SAVED BY ELIMINATING THE NEED TO HIRE ADDITIONAL STAFF

## ABOUT SOLVEXIA

SolveXia is a low-code platform that automates spreadsheet-driven data preparation and manual processes. It enables finance to free up their time by running processes 100x faster with 90% fewer errors, allowing businesses to reallocate essential resources to value-added work.

Finance and accounting teams choose SolveXia to unify data from systems and spreadsheets and automate their processes without involvement from IT. Its drag-and-drop interface makes it fast to deploy and easy to learn. SolveXia combines and manipulates data, performs calculations and creates interactive reports, analytics and smart dashboards for richer insights for your stakeholders.

You can leverage SolveXia to automate hundreds of processes for your company, including reconciliations, revenue and expense reporting, regulatory compliance, rebate management and much more.