

E-book

# Sage Intacct

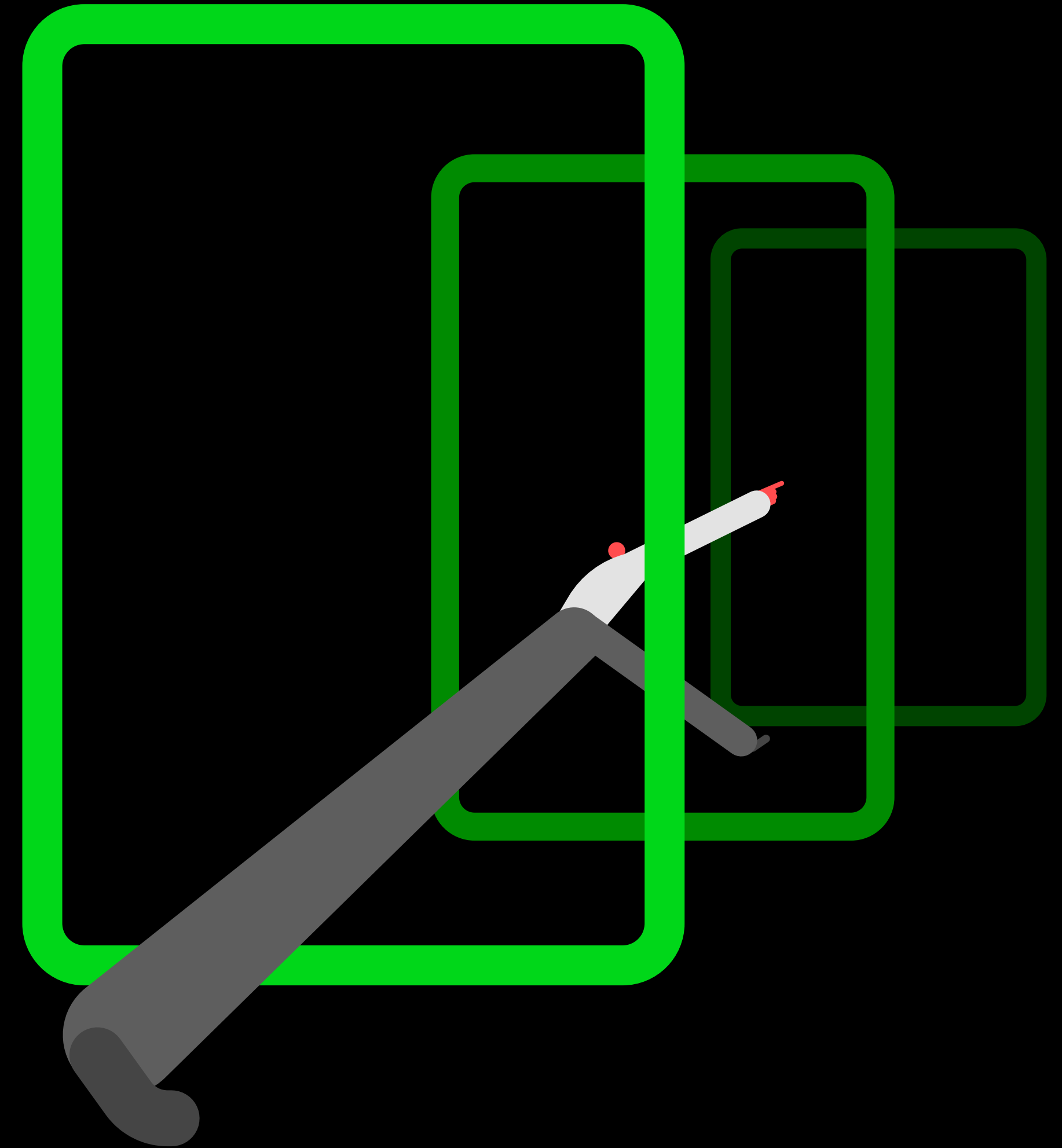
## Benefits of Cloud Accounting Software for Behavioral Health Nonprofits

Sage



# Table of contents

Introduction: Nonprofit accounting in the modern era	<b>Page 3</b>
Cloud computing: Why behavioral health nonprofits are moving financial management to the cloud	<b>Page 4</b>
Product overview: Sage Intacct for behavioral health nonprofits	<b>Page 6</b>
Conclusion: Accelerating your mission with Sage Intacct	<b>Page 20</b>
Quick links to educational resources	<b>Page 21</b>



## Introduction

# Nonprofit accounting in the modern era

### **You don't change accounting systems often.**

However, as your organization grows in size and complexity, you reach a point where manual, time-consuming processes drain your productivity, and flying blind without real-time visibility into key metrics and outcomes is stifling growth. As a good steward, you need a system that leverages the latest technology advancements.

At a minimum, a modern accounting system should automate and streamline core financial management functions such as accounts receivable, accounts payable, and financial close.

Sage



But you can hardly fuel your growth and need for accountability and transparency by simply automating the minimum. Health-focused nonprofits have accounting, tracking, and reporting needs that require specialized functionality in their financial management systems.

Today, inflexible, inefficient, and outdated on-premises software is rapidly being replaced by a new breed of modern cloud solutions. Over 90 percent of businesses report using cloud solutions today, and behavioral health nonprofits are no exception.

## Cloud computing

# The pain of dated technology

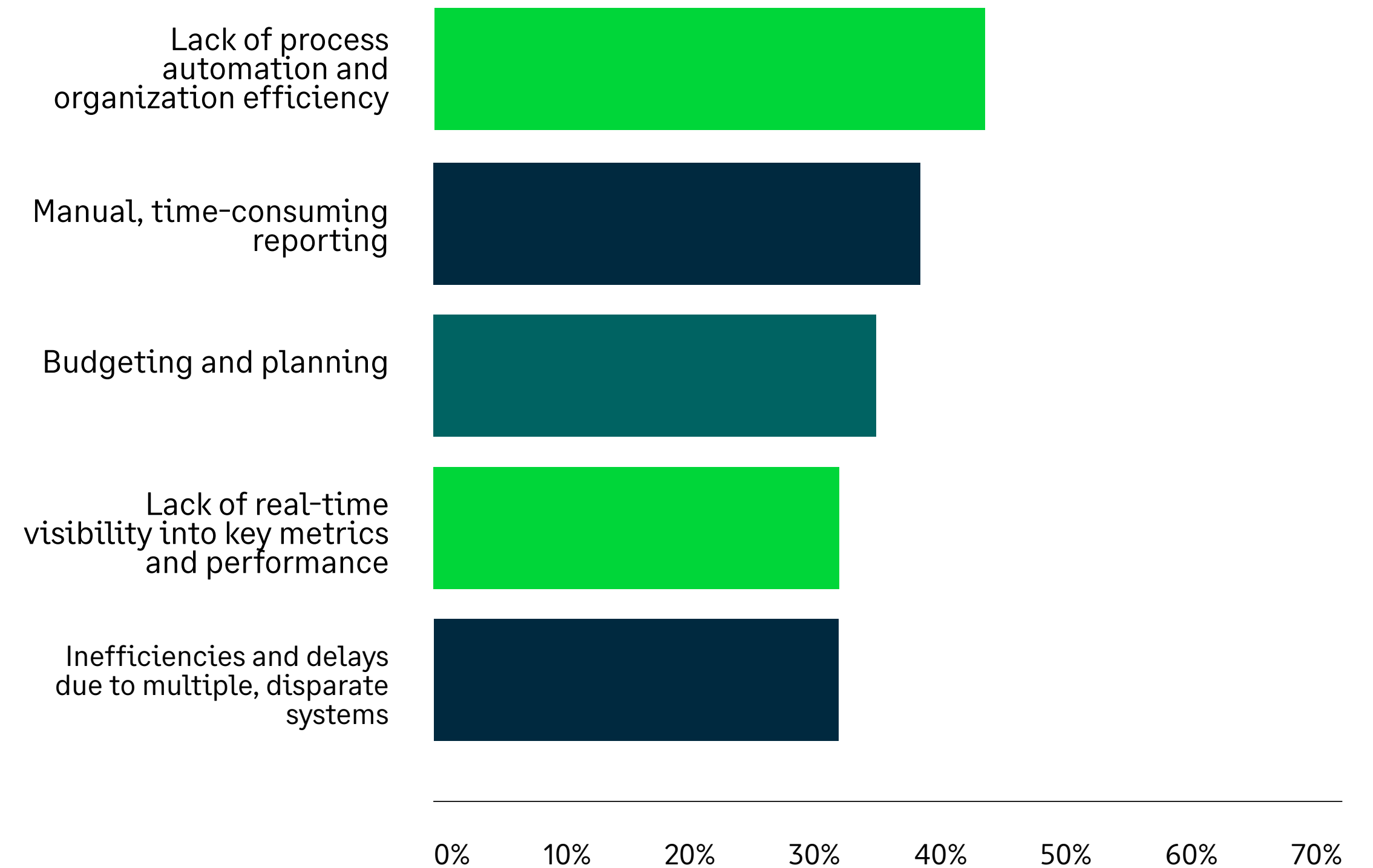
**In addition to external pressures like increased competition for funding, economic shifts creating more demand for services, and government regulations, challenges with internal processes and technology are also creating barriers to mission success.**

In a recent survey conducted by Sage Intacct<sup>1</sup>, nonprofit finance leaders said they spend too much time on manual accounting processes and not enough time on strategic work.

They bemoaned a lack of automation that hampered productivity and visibility. They find themselves hamstrung by disparate business and financial systems that do not share data and can't provide the metrics needed for mission-critical decision-making. To gain efficiency and insight, nonprofit finance leaders need better automation, better integration, and better visibility.



### Top 5 internal frustrations nonprofit finance leaders are facing



1. Nonprofit Technology Trends Report, Sage Intacct.

# 5 reasons why the cloud is right for behavioral health nonprofits



## 1. You only pay for what you use

No more complex and costly IT infrastructure

## 2. Your data is safe in the cloud

Skilled cybersecurity engineers use sophisticated software to watch over data centers

## 3. It supports a mobile workforce

Staff and volunteers can access the system anytime and anywhere

## 4. You're always using the latest version

No more outdated software and painful upgrades

## 5. Integrated solutions for nonprofits

Open APIs let you utilize best-in-class apps (patient billing, EMR, payroll, budget, CRMs, etc.)

## Product overview

# Sage Intacct for behavioral health nonprofits

**The only HIPAA-compliant accounting software preferred by the AICPA and Healthcare Financial Management Association Peer Reviewed.**

Specializing in helping nonprofits of all types including health and human services organizations, education organizations, trade and membership associations, philanthropic charities, cultural institutions, faith-based organizations, and more, Sage Intacct streamlines grant, fund, project, and donor accounting, while delivering real-time visibility into the metrics that matter.

Our modern, true cloud solution, with open APIs, gives nonprofits the connectivity, visibility, and efficiency they need to do more with less. At Sage Intacct, we help nonprofits strengthen stewardship, build influence, grow funding, and achieve mission success.



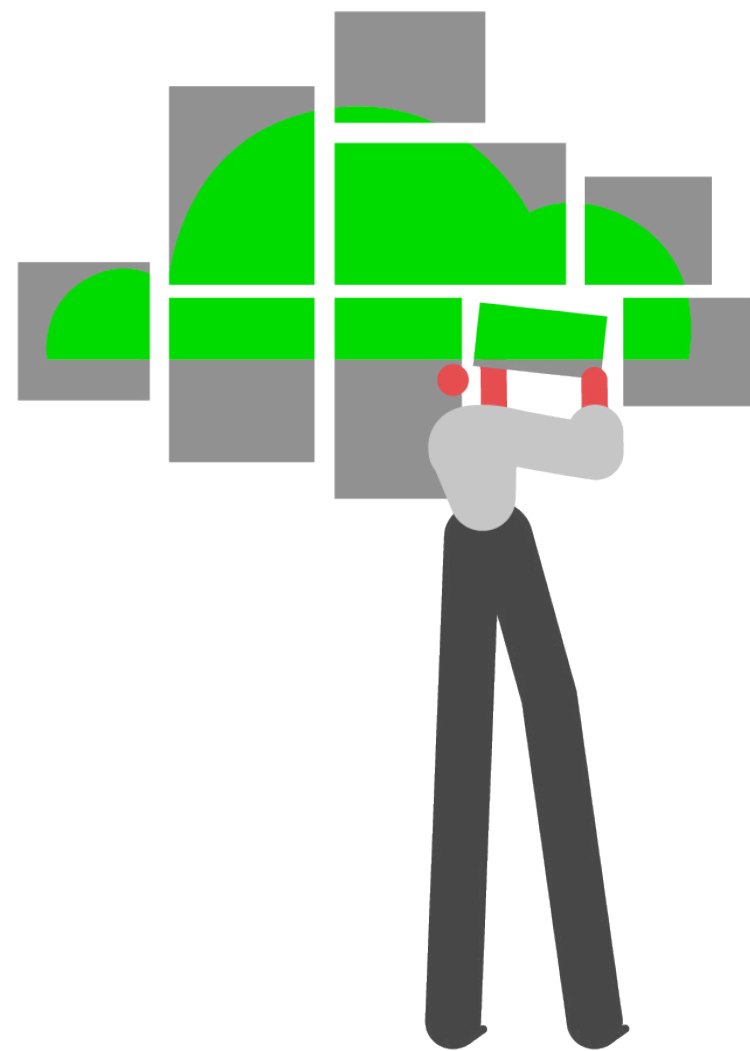
AICPA®

Business Solutions

Preferred Provider of Financial Applications



# Why behavioral health nonprofits love Sage Intacct



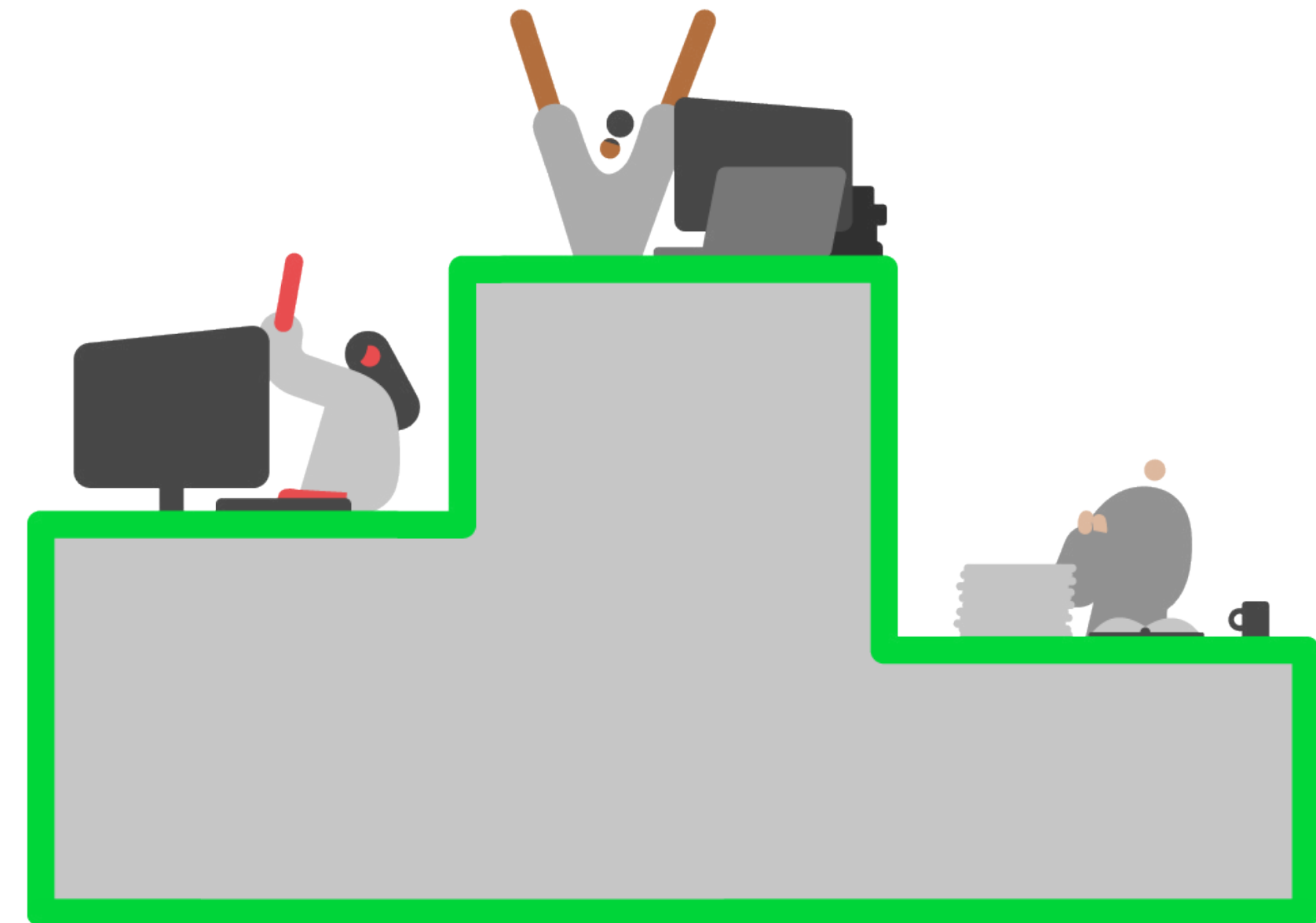
- **Delivers immediate visibility** into your financial data with easy-to-use, real-time financial and operational reporting and dashboards.
- **Ensures control and compliance** and reduces risk and cost with automated workflow and internal controls.
- **Maximizes stewardship** by automating grant, fund, and donor accounting.
- **Streamlines reporting and compliance** using built-in nonprofit-specific reports and FASB and IRS-compliant financial statements.
- **Provides anytime, anywhere access** for staff and volunteers, increasing finance department productivity by 30% or more.
- **Reduces IT infrastructure** costs and complexity.
- **Integrates seamlessly** with other critical business applications via an open API.

# Empower the modern accounting team

**Sage Intacct makes your team more effective and efficient from day one.**

With Sage Intacct, you can create tailored dashboards and reports—on the spot—that are relevant to your organization’s specific mission and operational measures.

Plus, you can do your job from any browser and any device with confidence. This also allows you to easily provide views to non-finance personnel, including the executive team, finance committee, and other key stakeholders within your organization that require insight for decision-making, including full drill-down capability to source documents.



You can also empower non-finance personnel to initiate finance department interactions such as expense requests, check requests, purchase requisitions, budget to actual, and more with flexible electronic workflows, easy-coding rules, and anywhere access.

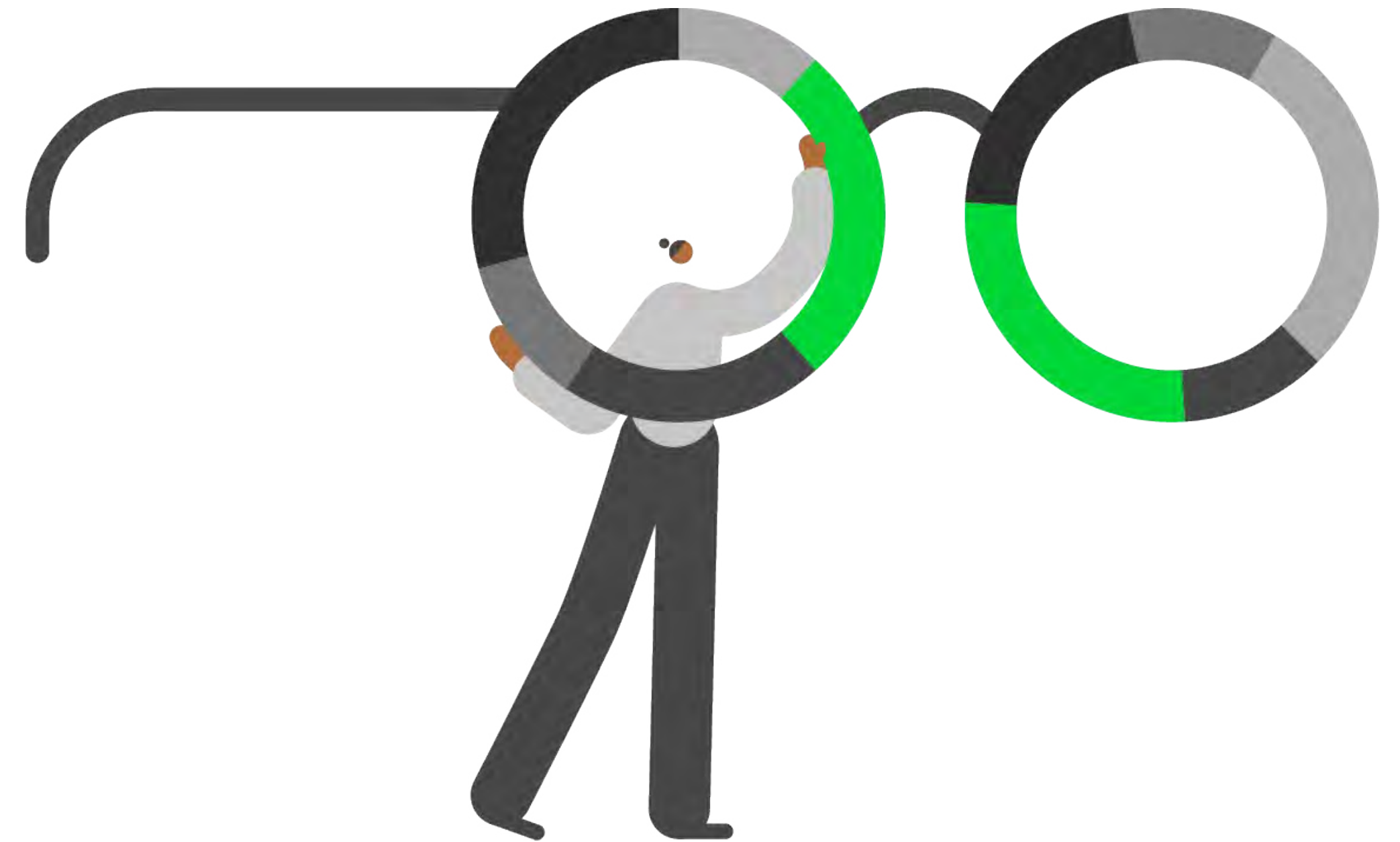
Streamline your audit process by giving your auditor permission-based access to your system.

# Gain real-time operational and financial visibility

**The days of flying blind with no real-time reporting and visibility are over.**

Sage Intacct provides a rich, multi-dimensional, multi-ledger system that enables you to easily capture granular financial and operational data in exactly the same way that you manage your organization.

Gain real-time visibility into every aspect of your organization's finances; whether you're interested in which funds were used for each program, the performance of your organization by location or practice area, the expense tied to each volunteer or employee, or any other aspect unique to your organization.



Sage Intacct role-based dashboards and rich reporting and analytics make it easy to keep a pulse on the financial health of your organization, as well as the health of individual projects, and to accurately budget for the months ahead. Sage Intacct automatically keeps your sub-ledgers and your general ledger synchronized in real-time, so you always have instant access to summaries and balances as well as transaction details.

# Behavioral Health Resources gains multi-dimensional visibility

**“Sage Intacct is very dynamic and can report on anything we want. For example, we needed to separate out financials for our medical operations, which isn’t a standalone program but spans our children’s and adult departments in three counties. Now that we tag all relevant transactions to a ‘medical’ project, we can easily see how much of each department’s income and costs come from medical treatment as opposed to mental health or other services.”**

~ Eric Jensen, Director of Finance, Behavioral Health Resources

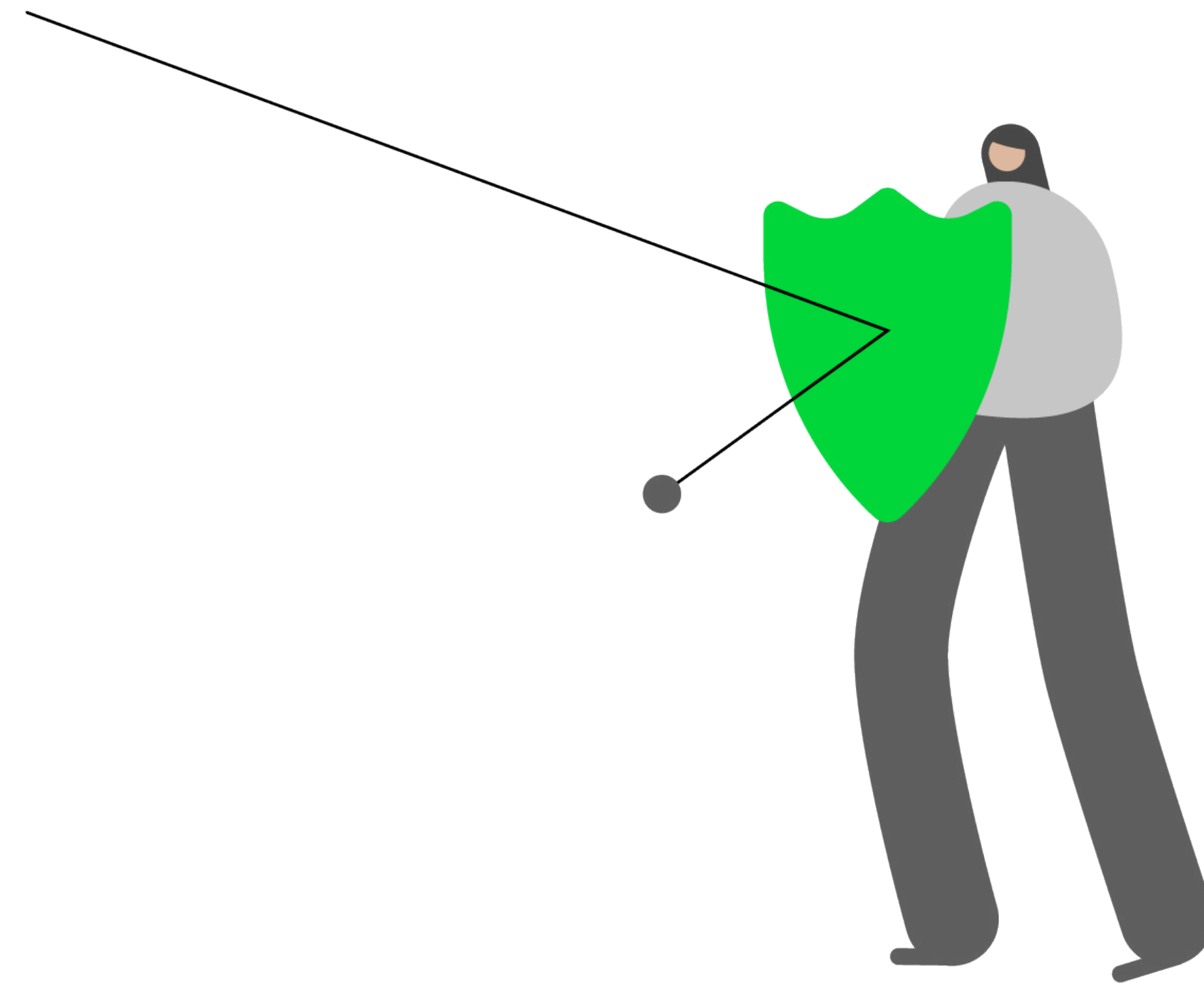


# Safeguard PHI with HIPAA-compliant financials

## Ensure appropriate protections are in place.

If your organization is subject to the Healthcare Insurance Portability and Accountability Act (HIPAA), you need technology partners that have compliance tools, certification, and commitment to safeguard protected health information (PHI).

To meet HIPAA requirements to monitor PHI access, Sage Intacct provides an Advanced Audit Trail. This tracks access to contacts, customers, and vendors stored in Sage Intacct. No matter how the records are accessed—viewed in a list, a dropdown, a report, or via an API—the access is logged and available for reporting to support internal or external audits.



Our security safeguards have been certified as HIPAA-and HITECH-compliant by Avertium, and Sage Intacct is willing to enter into a Business Associate Agreement with eligible healthcare clients.

With Sage Intacct, you have the peace of mind that you can meet strict regulatory requirements.

# Tri-County Mental Health gains peace of mind with HIPAA-complaint financials

**“In Sage Intacct, rather than printing individual journal entries for signatures, everything is easily prepared, routed, approved, posted, and tracked via an audit trail. Our accounts payable workflows are significantly easier, freeing us up to finally be forward-looking. What’s more, the system’s role-based workflows and HIPAA-compliant security provide internal controls and documentation, giving me peace of mind that we’re audit-ready.”**

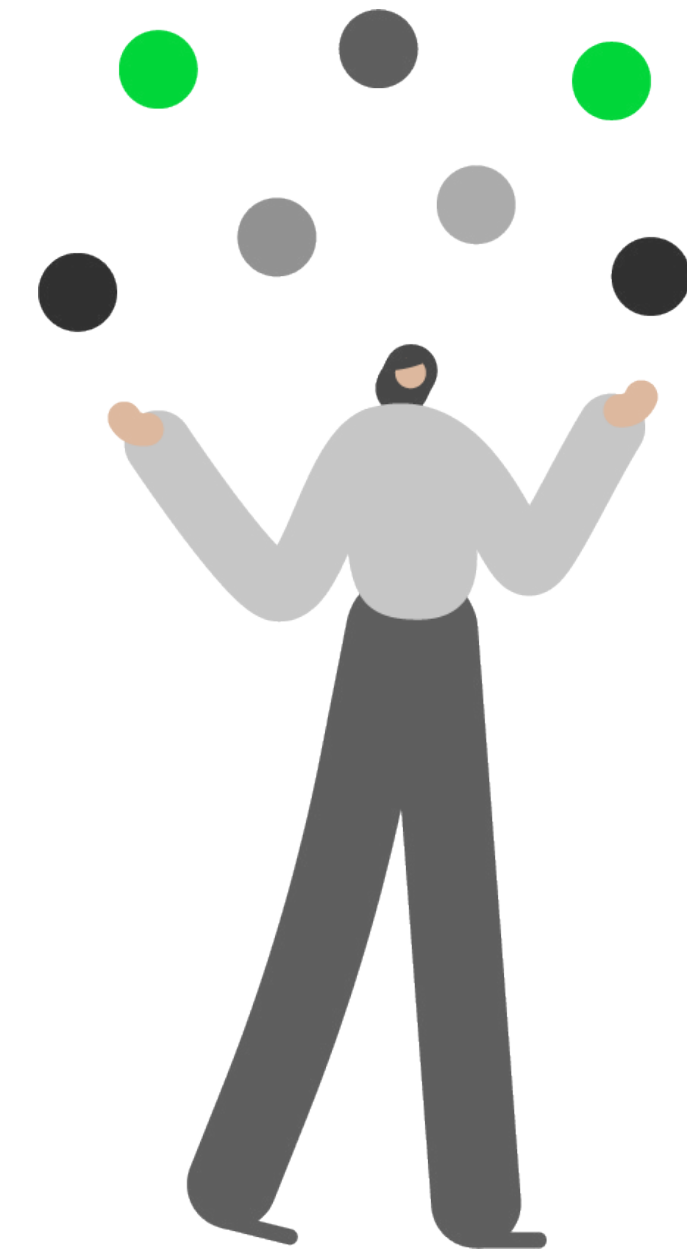
~ Michelle Naus, CFO, Tri-County Mental Health Services



# Master multi-entity, multi-location, and multi-currency management

## Your nonprofit is complex, but your system doesn't have to be.

Whether you're an FQHC or community health clinic with multiple practice areas and locations, a mental health treatment facility, a medical research institute, a health association that manages hundreds of independent chapters, or a global health organization with subsidiaries and satellite offices in multiple countries, Sage Intacct automates multi-entity, multi-site, multi-currency, and multi-country operations.



Streamline inter-entity transactions, allocations, eliminations, and financial consolidation, reporting, and analysis with extensive built-in automation and one-click consolidations.

Take advantage of deep support for global nonprofits with automatic multi-currency transactions and reporting. Plus, you can store, manage, and report any data in multiple currencies.

# Health Solutions cuts monthly close 65% by automating intercompany process

**“By automating the entire intercompany process, Sage Intacct saves us at least two hours of journal entries. It also allowed us to consolidate our many bank accounts, minimizing all the related bank fees and administrative burdens. And being able to complete expense prepaids and complex allocations with a few clicks dramatically cut down our monthly close.”**

~ Paige Oldham, CFO, Health Solutions

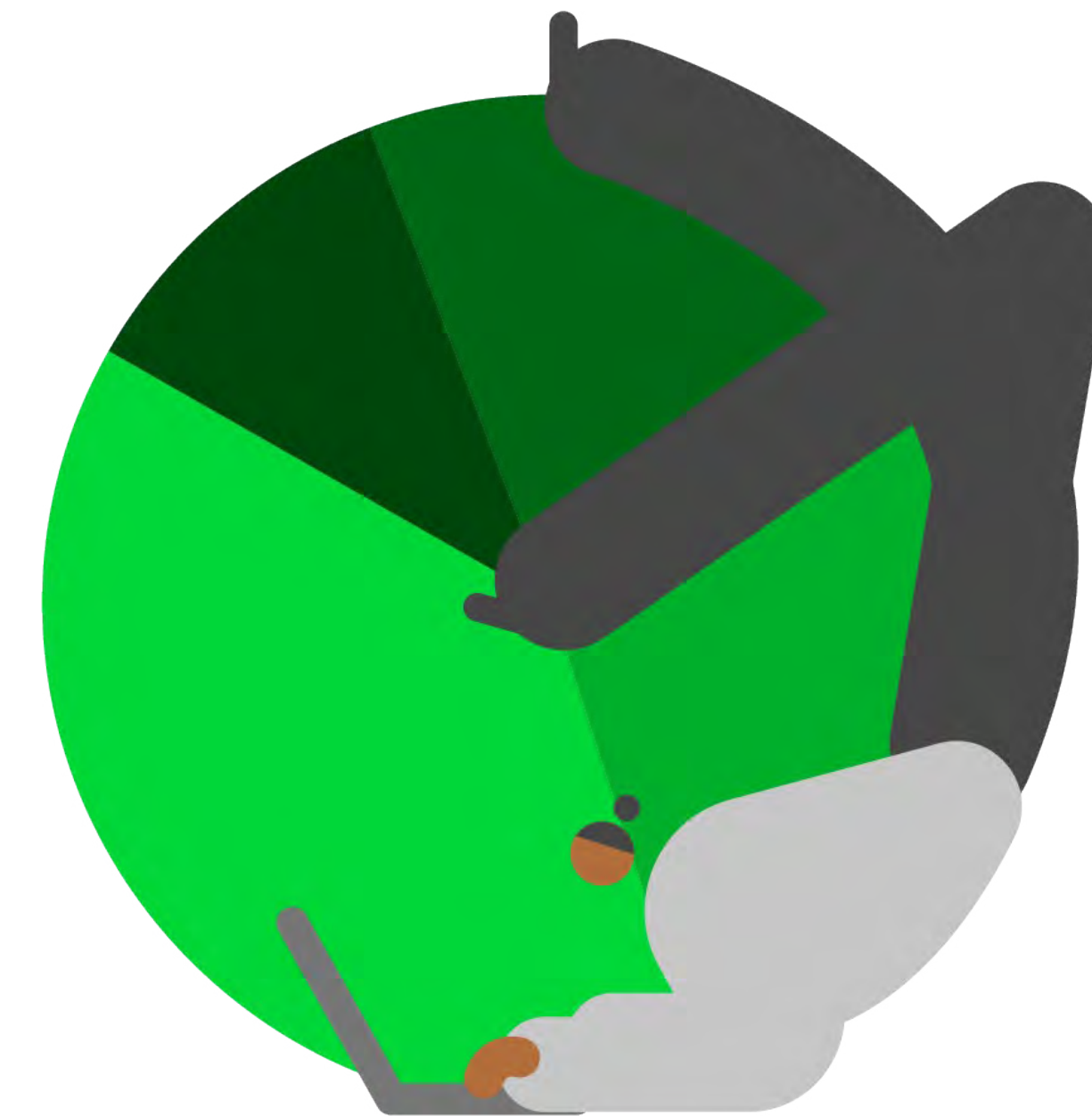


# Infuse flexibility and automation

**Your system should work the way you do, not the other way around.**

Sage Intacct allows configurable design to bring flexibility and automation to your organization's operational workflow processes, and tracking and reporting toolsets, making compliance an "of course" and freeing up time to focus on strategic financial management.

As your organization evolves, financial operations need to keep pace with transaction tracking procedures, internal controls, and reporting views that support current and future organizational needs.



Designed to evolve with your organization, the Sage Intacct flexible and configurable architecture can be adapted to the tracking, electronic approvals, and workflow requirements for your operational structure and provide insights to best support your mission now and in the future.

# FQHC **Hunter Health** increase efficiency by 75%

**“It’s been a win-win to shift purchasing out to the departments and give them Sage Intacct logins so they can check their budgets, get vendor quotes, make purchase decisions, enter transactions, and store all federally required documentation in the system. We no longer need paper backups or a full-time AP clerk to manage vendor invoices, and our budget owners enjoy having more control over their spending.”**

~ Laura Winchell, CFO, Hunter Health Clinic



# **Simplify** grant, **fund, and donor** **accounting**

**Running reports tailored to each funder's requirements shouldn't be hard.**

No two funding sources are alike, creating extraordinary complexity in nonprofit accounting. From revenue recognition to reporting, Sage Intacct makes it easy to measure the effectiveness of your organization's programs and demonstrate your financial responsibility to donors, grantors, volunteers, and others.

Sage Intacct features robust fund, grant, and donor accounting, flexible budgeting and planning, real-time reporting, and role-based dashboards.



Engage both employees and volunteers in your financial processes with built-in expense management, time and billing, and purchasing applications—saving hundreds of hours of staff time every year. You'll also save hours every month and eliminate errors by getting rid of spreadsheets to calculate allocations.

# FQHC **Seattle Indian Health Board** scales financial management amid 80% revenue growth

**“Sage Intacct has really driven our ability to scale with 80% growth. There’s no way we could have done that without Sage Intacct — it would have been insurmountable to track, manage, and report on all that data and in essence, 100+ grant ‘revenue centers.’”**

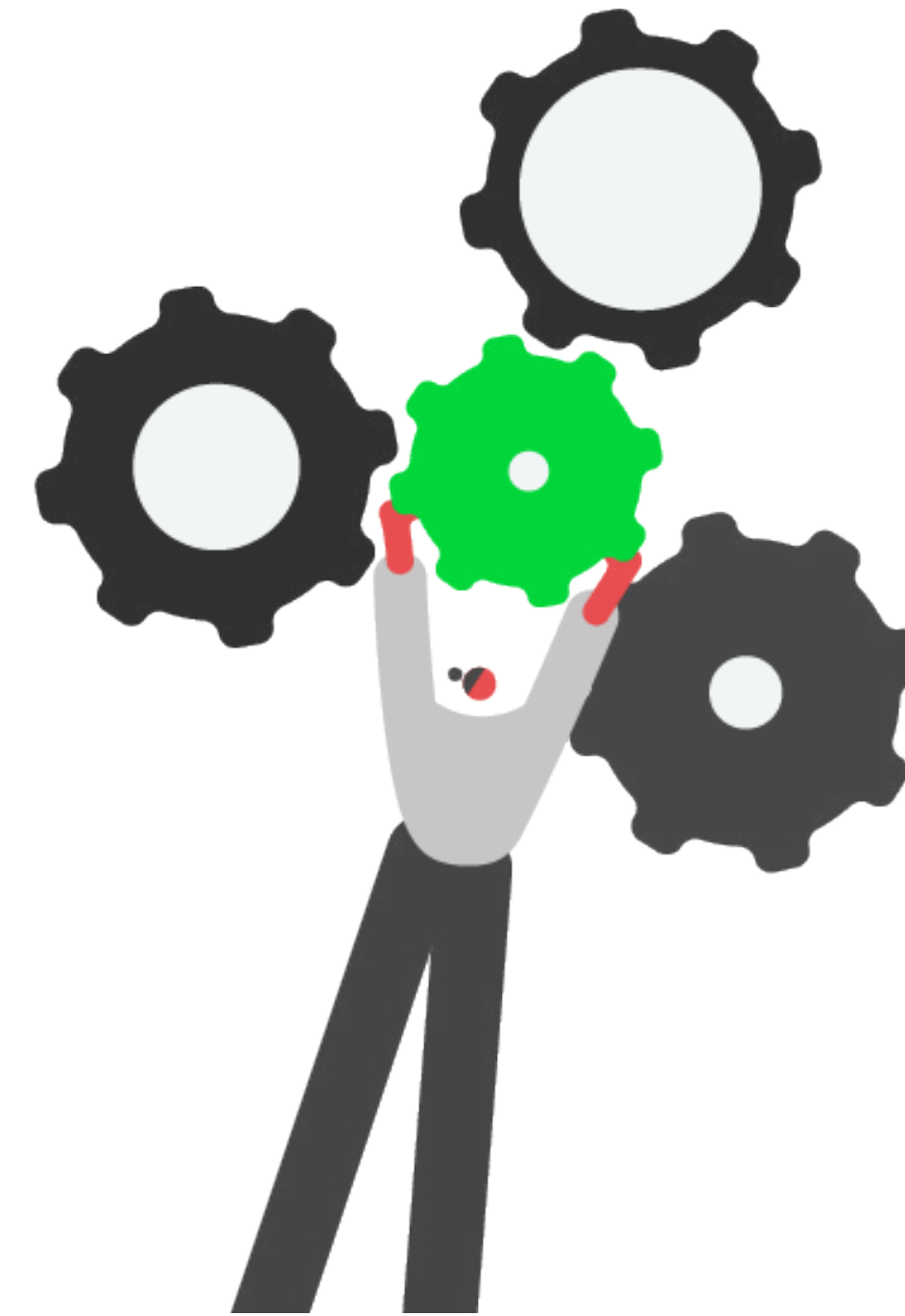
~ Ben Luety, CFO, Seattle Indian Health Board



# Strengthen your organization with best-in-class solutions integration

**Gain peace of mind with seamless third-party business application integrations.**

At Sage Intacct, we pride ourselves on being the best cloud financial management solution on the market. And we believe you should have the freedom to choose the best solutions for all of the other areas of your organization. That's why we partner with more than 200 software solution providers—enabling you to streamline processes by connecting Sage Intacct with fundraising solutions, payroll, donor management solutions, church management, and many more specialized applications.



The Sage Intacct open API and true cloud integration strategy allows for easy, intuitive imports or seamless integration via web services. This ensures that your finance team stays current with modern processing and reporting insights for your management team by harnessing technology to work smarter.

For more information, browse the [Sage Intacct Marketplace](#).

# **Pavillon** increases efficiency by 45% and shortens close with automation

**“My staff is able to do their daily bookkeeping, reconcile bank statements, upload payroll entries directly from ADP and revenues from our clinical system, and print checks to pay vendors—all of which is effortless in the platform. Meanwhile, I just approve things online and can close the month in four days. In all, Sage Intacct’s easy-to-use workflows have made us about 45% more efficient.”**

~ Kent Spear, CFO, Pavillon Treatment Center



## Conclusion

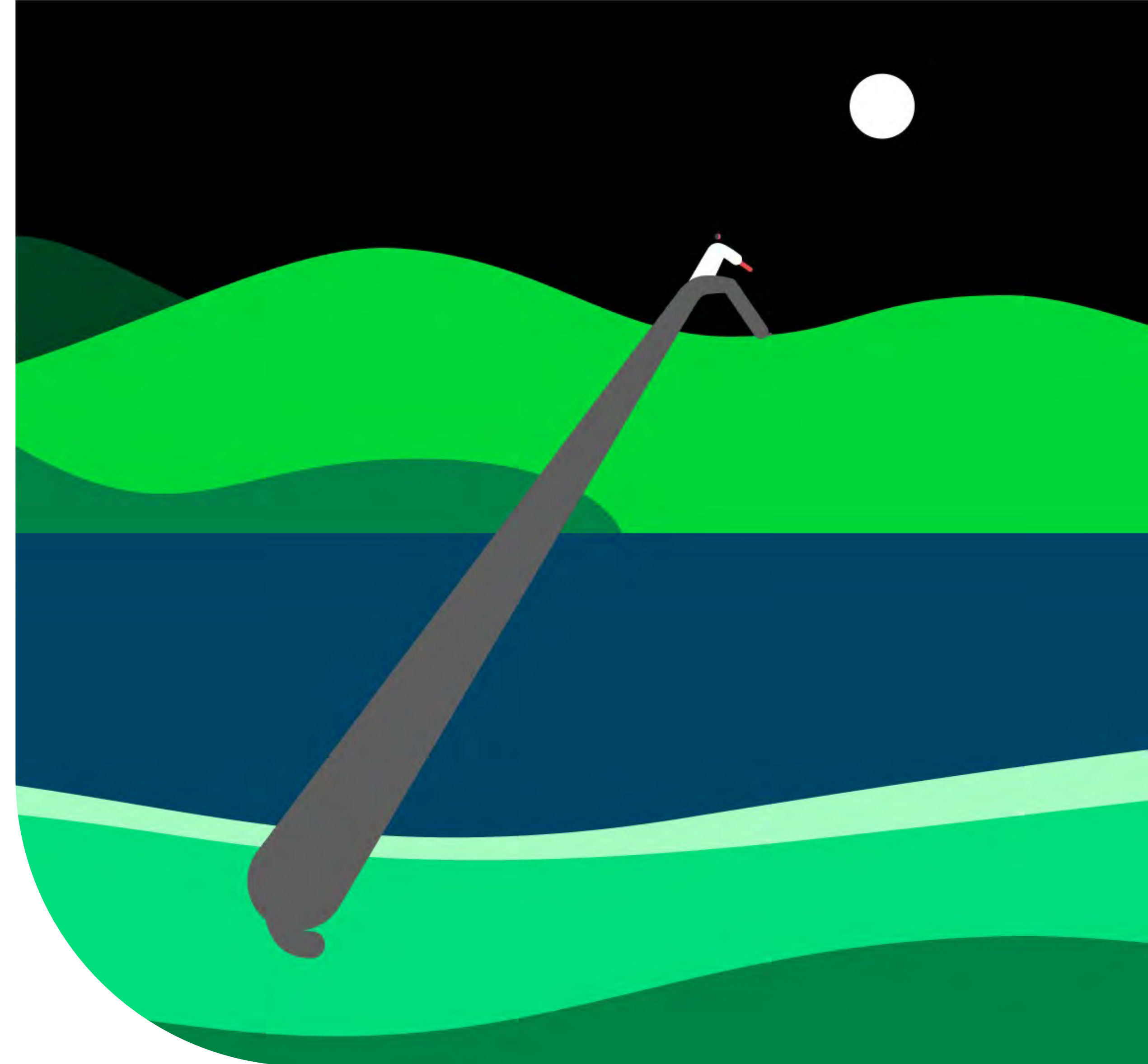
# Accelerate your mission with Sage Intacct

**“Do more with less” is the mantra of today.**

Sage Intacct can help you accomplish your mission by providing you the visibility, flexibility, efficiency, automation, and integration you need to succeed.

Replacing and updating your old accounting solution with a modern, best-in-class cloud solution built for nonprofit organizations can cost less than you think—while saving you time and resources.

We can help you prepare an ROI analysis for your key stakeholders and discover how you can lead your organization to better stewardship and greater impact. Our mission is to help you achieve your mission.



# Quick links to educational resources

Looking to move your nonprofit finance operations to a new cloud accounting system? Here are some additional resources to help you make the right decision.

**Product overview video**

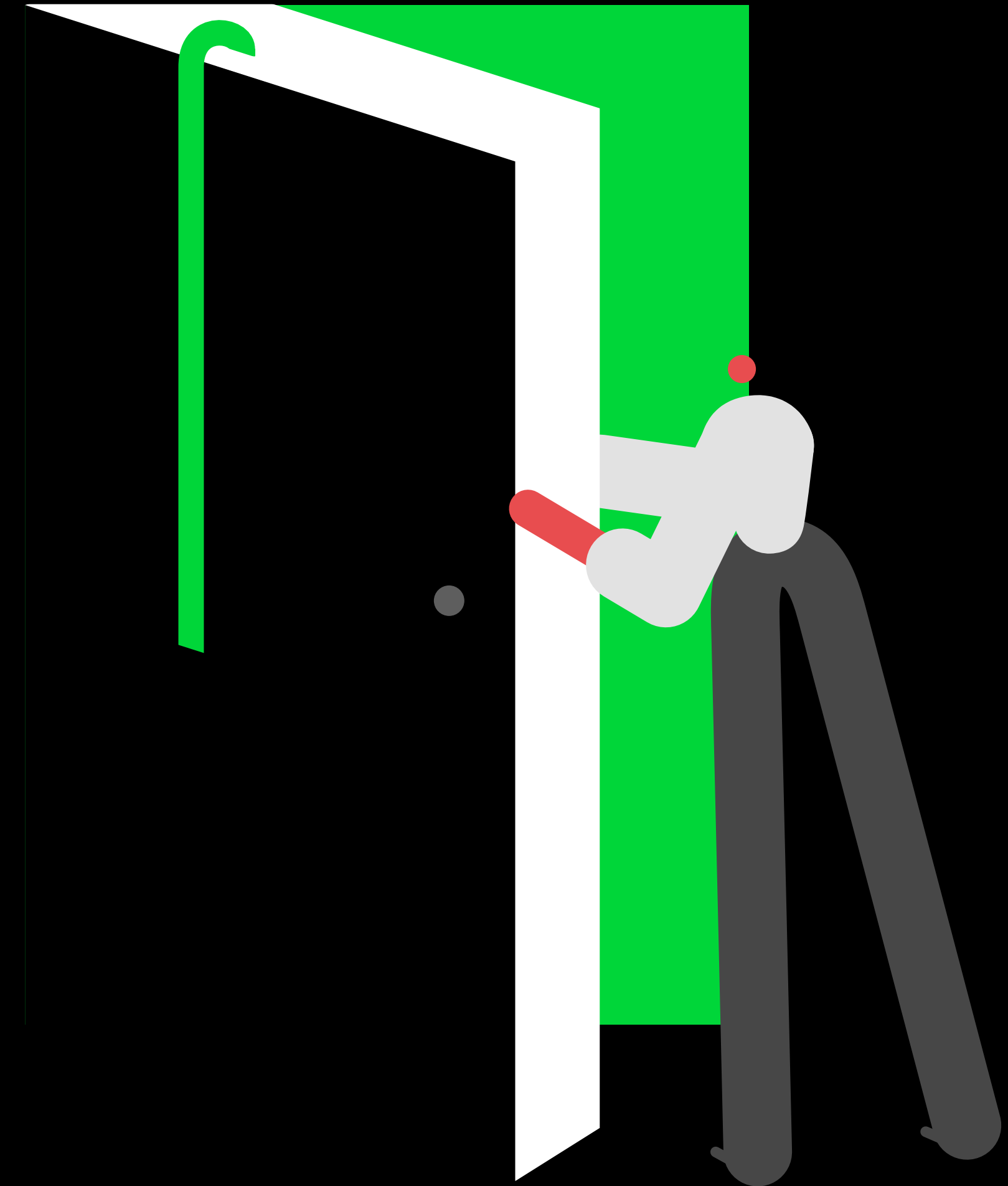
[Sage Intacct for healthcare nonprofits](#)

**Customer story video**

[Tri-County Mental Health Services](#)

**More resources**

[Browse all resources](#)





[sage.com/nonprofit](https://www.sage.com/nonprofit)  
877-437-7765



**Sage**

©2025 The Sage Group plc or its licensors. Sage, Sage logos, Sage product and service names mentioned herein are the trademarks of The Sage Group plc or its licensors. All other trademarks are the property of their respective owners.