

Nonprofit Healthcare Provider Boosts Accounting Efficiency 80%, Gains Agility in COVID-19 Crisis

Whole Family Health Center



Challenges

Whole Family Eliminates Nearly 50 Hours of Manual Accounting

Florida-based Whole Family Health Center provides healthcare services to patients from infants to the elderly, including individuals with limited resources and access to care. During the COVID-19 pandemic, the nonprofit added 10 new providers, for a total of 16 based at clinics in Fort Pierce and Vero Beach on the Atlantic coast. With its workforce growing from 60 to 105 full-timers in the last four years, Whole Family Health Center treats roughly 600 patients a month with adult, pediatric, behavioral, telehealth, pharmacy, and HIV/AIDS services.

Since March 2020, Whole Family has been on the front lines of COVID-19. That includes the four-person accounting team, with members pitching in to answer phone calls and schedule vaccination appointments on weekends in addition to their regular duties. Fortunately, a well-timed move to Sage Intacct just as COVID struck freed the accounting team from slow and labor-intensive manual work in Microsoft Excel and Sage 50, Whole Family's previous accounting platform. The nonprofit graduated to Sage Intacct to deal with its growing workload and get around limitations in reporting and core accounting functions in its legacy on-premise solution.

"We didn't have enough capability in Sage 50 to run reports the way we needed," said Sabrina Rivera, AP and payroll specialist. "We'd have to download to Excel and do a lot of manual work just to build one report. We weren't able to provide the reports that the board of directors wanted in a timely matter." Now on Sage Intacct, Whole Family has improved overall accounting efficiency by 80% and eliminated nearly 50 hours of manual work each month. It's delivering more accurate reporting faster for executives, the board, and government funders, while improving its ability to navigate the challenges of the pandemic.

Solutions

A 73% Faster Close and On-Demand Insights via Dashboards

After evaluating Oracle NetSuite, Whole Family selected Sage Intacct for its superior ease of use, simplicity, and built-in HIPAA compliance. Plus, the IT department preferred Sage Intacct and remaining within the Sage product family of products. Implementation and staff training by Sage Intacct partner CliftonLarsenAllen got Whole Family on the fast track to success. "CLA was amazing," Rivera said. "The implementation was very smooth and clear, and their knowledge and response time was great. It was so nice to have a partner you knew you could rely on."



Company Overview

Based on Florida's Treasure Coast, the nonprofit Whole Family Health Center offers comprehensive primary care services to the community regardless of a patient's socio-economic status and ability to pay.

Learn More at:

<https://www.wfhcfl.org>

Executive Summary

Previous Software:

- Sage 50

Results with Sage Intacct:

- Improved overall accounting efficiency by 80%
- Eliminated nearly 50 hours of accounting manual work a month
- Reduced monthly close time by up to 73%, to eight days
- Improved reporting timeliness, scope, and accuracy

NONPROFIT HEALTHCARE PROVIDER BOOSTS ACCOUNTING EFFICIENCY 80%, GAINS AGILITY IN COVID-19 CRISIS

Whole Family is now closing its monthly books in eight days, down from as many as 30 days, a 73% reduction. Improved efficiency and ease of use allow Rivera to reconcile bank transactions and manage journal entries on a daily basis, rather than in month-end rush. Handling credit card expenses is streamlined with Sage Intacct and a Divvy credit and expense management solution, saving eight hours a month. Automated accounts payable has eliminated paper-based manual processes, including six hours a month that the CEO spent signing checks. And with the Sage Intacct Fixed Assets module, Whole Family is on track to cut 12 hours a month of manual data entry into spreadsheets.

The biggest time savings is in reporting, at 20 hours a month. Whole Family uses tagged dimensions including location, department, and funding sources for deeper insights into costs and revenue streams, which include federal and state grants, Medicare and Medicaid, and insurance carriers. Personalized dashboards give the CEO and a half-dozen managers key metrics with ability to drill into reports and detail. "Our CEO can go to her dashboard for the data she needs and access reports we've saved in the system," Rivera said. "Managers don't need to ask us for information because it's available in their dashboards, and it's accurate."

Results

Robust Reporting to Meet Federal COVID Requirements

Efficiency and reporting benefits have proven vital throughout COVID-19, especially as Whole Family earned U.S. government certification as a Federally Qualified Health Center (FQHC) and provides primary care services to underserved communities. Along with increased federal funding, the certification introduced new reporting requirements that Whole Health would have been hard pressed to meet with its legacy system. "We have a lot on our plate, and Sage Intacct has been very helpful in how we can run reports by funding source and any other dimension," Rivera said. "If we were still on Sage 50, the COVID-related grant reporting would have been difficult because we'd be relying on spreadsheets. We don't have the luxury of days to produce a customized report."

Whole Family's board of directors is delighted with the marked improvements in reporting speed, depth, and presentation. Overseeing a cost-sensitive nonprofit, the board was initially skeptical that a new accounting platform was needed, though they weren't happy with previous reports. "When they saw the huge difference in reporting and presentation they said, 'If we'd known this, we would have approved a new system a long time ago,'" Rivera said. "They've been giving us compliments on how great the reporting has been with Sage Intacct. They can understand the reports and the numbers very easily."

Relieved of the manual work of the past, Rivera is able to focus more on an ongoing payroll system implementation, additional Sage Intacct training, expanding analytics and reporting, and keeping pace with FQHC requirements. "Before we moved to Sage Intacct, I was working a lot of overtime — starting early and working late, even seven days a week," Rivera said. "Sage Intacct has saved us so much time and let me focus on other things." When COVID vaccines became widely available in early 2021, that has meant extra non-accounting duty on weekends for Rivera and other staff. "I'm working Saturdays and Sunday at a clinic with the patients, certifying vaccine appointments and scheduling follow-ups," she said. "It's been a little bit crazy, but I do enjoy it."

“Accounting and finance is 80% more efficient since we moved to Sage Intacct. We're able to run customized reports in a timely manner, and it's so much easier to categorize any specifications we need to report on for a specific grant or fund.”



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