

A Continuing Care Retirement Community Struggled to Keep Department Heads Updated

Overview

Industry

Continuing Care Retirement Community

Customer Profile

Offering the highest quality of senior living in an independent or supportive environment

Business Situation

Baptist Homes had faced a challenge that many CCRC's and Human Service Organizations face: getting financials to department heads on a timely basis and keeping them updated throughout the month.

Solution

- Dynamics GP 2010
- FRx 6.7
- SQL Reporting Services

Benefits

Generation and delivery of monthly reports went from an average of nine days to one.



"At Baptist Homes, information technology is viewed as paramount in order to make the best business decisions"

Jim Greene, Director of Information Technology

The Challenge

Baptist Homes CFO, Brent Foster had faced a challenge that many CCRC's and Human Service Organizations face: How do I get the monthly financials to the appropriate department heads on a timely basis and how do I keep them updated throughout the month.

First implemented in 2002, Baptist Homes' use of Microsoft Dynamics GP and other Microsoft products has continued to expand over the years. Like many long term users of the systems, Baptist Homes hadn't taken the time to review ongoing processes to see if new advances in Microsoft Dynamics GP could be implemented, which could ultimately save time and money.

The Solution

Baptist Homes engaged with their partner, Vertical Solutions, to complete a Business Process Audit to review their current system configuration in relation to their current needs. The audit documented several bottlenecks and pain points in regard to current reporting creation and distribution process.

Vertical Solutions recommended Baptist Homes automate the delivery of key monthly revenue and expense statements via FRx and implement SQL Reporting Services to deliver web based access to trail balance and point in time details of expenditures against budget. Since SQL Reporting Services is native functionality

that has been included in Dynamics GP 10 and beyond, Baptist Homes' acquisition of this functionality did not require an additional investment.

This project resulted in Baptist Homes having the ability to automate the generation and delivery of these reports from roughly days to an hour and gave the departmental managers the insight they needed to effectively manage expenditures within the month.

About Baptist Homes

Since 1910 Baptist Homes Society has touched the lives of numerous older adults and their families throughout the South Hills of Pittsburgh, PA. They are a nonprofit charitable organization serving adults of all faiths who require assistance because of age, illness, or disability.

About Vertical Solutions

Vertical Solutions, enables you to profit through a partner, who can support your agency functions by providing business management software, business processes, and technology expertise.

We provide nonprofit organization high-quality service, but at the same time, careful administration - to reduce expenses and automate processes. In particular we provide Social Service Organizations meticulous reporting practices - essential for meeting regulatory compliance and securing future funding.