



Intellitec Solutions

# Provider of In-Home Care Handles Payroll and Tracks Expenses With Microsoft Dynamics SL

CareGivers America provides a full spectrum of medical and nonmedical services to allow seniors and the disabled to remain in their own homes.

The Pennsylvania-based company also supplies nurses and aides to hospitals and skilled-nursing facilities and recently started up a temporary staffing agency unrelated to the healthcare field.

## Business Challenge

Several years ago, CareGivers consisted of one company providing nonmedical, in-home care & medical staffing out of seven PA locations. Since then, they have opened 5 additional PA locations and 3 NY locations, and established six new companies. Since CareGivers is mainly a service business, accurately tracking the time their caregivers spend with clients is the most critical factor in assuring their financial success.

The accounting software CareGivers originally used performed adequately when the company was smaller. As new offices opened and additional companies were created, CareGivers outgrew their healthcare accounting software solution in terms of the number of employees that its payroll system could handle, the adequacy of its project reporting, and its ability to process the large number of intercompany transactions.

CareGivers made the decision to identify and implement a new accounting solution. A robust payroll module was the most important requirement, but the ability to easily and efficiently perform intercompany

transactions such as GL salary allocations and charging employees' time to different companies was also critical. CareGivers also desired improved project reporting, as well as the ability to track accounts receivable by individual clients, not just by the payer.



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## Technology Solution

CareGivers chose Microsoft Dynamics SL as their core healthcare accounting software solution, supplemented by an assortment of third-party and custom applications to meet specific needs. Dynamics SL easily supports their payroll, GL allocation, and intercompany transaction requirements while offering the flexibility and capability to accommodate future growth, expanded use, and eventual integration with additional applications. It also provides the enhanced project reporting they need. And a customization within the Dynamics SL accounts receivable module allows them to track invoices by individual clients.

CareGivers does not have in-house IT resources. They recognized that

implementing the Dynamics SL package with all the necessary customizations and integrations would require collaboration with a skilled, experienced implementation partner that could quickly learn and understand the complexities of their business, design an appropriate implementation strategy and plan, and, most important, deliver on the plan and budget. Unfortunately, the first partner they chose proved not to be up to the task.

In early 2010, CareGivers regrouped and chose Intellitec Solutions as their integration and implementation partner. CareGivers singled out Intellitec’s thorough, comprehensive sales presentation and candid assessment of the time and

commitment that would be required to complete their project as the key factors in their decision.

The first challenge was for Intellitec's consultants to quickly gain an understanding of CareGivers' complex business model and operations. This turned out to be a strong point for Intellitec, as their consultants were able to learn the business quickly. CareGivers reports high marks for Intellitec's knowledge and understanding of their business.

Intellitec and CareGivers worked together to devise a phased implementation plan. The project kicked off in April 2010, and Phase 1 (Dynamics SL's GL, AP & Cash Manager) went live in September 2010. Phase 2 (AR Features) followed quickly in October 2010, and Phase 3 (Payroll) debuted in January 2011. In addition to implementing the Dynamics SL core modules, Intellitec also developed custom applications, completed numerous customizations within Dynamics SL, and integrated legacy and other third-party applications.

## Technology Solution

According to CareGivers, the implementation went smoothly, and Intellitec was great to work with. Intellitec's consultants listened to CareGivers' needs and concerns and understood the business so well that they were able to identify potential issues and consequences that CareGivers didn't think of. In the words of one executive, "We couldn't have asked for a better consultant."

CareGivers says that their Dynamics SL healthcare accounting software solution has been more than adequate to meet their needs. Payroll processing is more efficient, and SL's robust reporting has increased the value of the information they can get from the payroll module. Intercompany transactions and GL allocations are now



integrated and automated, so intercompany accounts are always balanced. The customizations and integrated applications have also contributed to saving many hours of previously manual processing, making for a happier staff.

CareGivers worked with Intellitec to upgrade from Dynamics SL 7.0 to 2011. They also are interested in making more customizations and integrating additional third-party applications to further streamline workflow, improve productivity, and capture "better information to make better decisions."