



Nurturing Growth and Better Care Through Sage Intacct + PCC

Whitney Center is a continuing care retirement community (CCRC) providing independent living, assisted living, memory care, skilled nursing, and at-home care services.

They needed cloud accounting software that could keep up with its growth, simplify reporting, and provide clearer insight across the organization.

Outgrowing an Inflexible Accounting System

Whitney Center was using MatrixCare LifePlan Community Platform, which gave them significant challenges.

Anne Matist, the Controller, explains, "That platform is not very flexible. You had to create unique general ledger accounts if you wanted to change a department or a location. For expendable supplies, if you wanted to record expendable supplies in assisted living, memory care, the SNF, and continuing care at home, you needed four different accounts for each of those." This made managing accounting unnecessarily complicated and time-consuming.

Correcting mistakes in the system was also time-consuming. "Undoing anything was a nightmare. Once you posted something to the general ledger, you had to go in and correct it; you couldn't delete it, and if you made a mistake in the correction, then you had to correct the correction. It's not flexible at all," states Matist. This forced the team into tedious processes that created more work and confusion.

Reporting was another major pain point. "The reporting packages that plugged into it were either really expensive or had been sunsetted, so there was no support. It's also not very user-friendly. It's not intuitive." Together, these challenges highlighted the need for a more flexible, modern cloud accounting software platform.

Connecting Care + Finance Systems

One of the most important things to us was being able to provide a single bill to our residents & couples. In MatrixCare, if somebody from an independent living apartment had a health event, went out to the hospital, and then wanted to access the skilled nursing facility for a short-term stay, they would get two bills: one for their apartment and one for their healthcare,” recalls Matist.



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To solve this challenge and better support resident care operations, Whitney Center selected PointClickCare (PCC). PCC’s ability to support consolidated resident billing became a major factor in the decision. Once PCC was selected, Whitney Center began searching for cloud accounting software that could integrate seamlessly with it.

PCC recommended partnering with Intellitec Solutions to implement Sage Intacct cloud accounting software because of their powerful proprietary IntelliConnect integration connecting PCC & Sage Intacct.

“I don’t think we explored any other accounting platforms because it was just so highly recommended by PCC. We looked at it, and it was exactly what we were looking for,” Matist shared.

Sage Intacct provided everything Whitney Center needed to manage multiple care levels, departments, and locations within a single financial system. Matist explains further, “It had the flexibility of one general ledger with multiple facets to an account, so we could be flexible about what department something was going to, what location it was going to, what care level it was going to, and whether it was billable or not.”

Integration that Supports Senior Living

Intellitec’s integration of PCC with Sage Intacct went beyond simplifying financial processes. For Whitney Center, it created a more connected environment where financial, payroll, and operational data could

be centralized to support both internal visibility and the complex reporting requirements unique to senior living.

“When we bring payroll in, we bring in wages, but we also bring in the statistical data of hours worked by the type of job and the location they’re working because we have to report out to the federal government what our hands-on care hours are in our skilled nursing facility.”

Matist shares, “We also report on cost reports to the state and the federal government. The hours worked in almost every classification: dining, housekeeping, administration, everything. We use UKG right now for payroll, and they push out. We have an export-import process where they push out the statistics of labor hours, and we bring them into Intacct.”

Leveraging Intellitec’s expertise, Whitney Center created a more accurate and efficient approach to reporting while reducing manual data collection and reconciliation efforts. “Anywhere we can pull things into one place is good. Being able to generate reports in one place that tell you both hours and wages is really useful.”

She continues, “Anytime we have a question about one of the connections we use, Intellitec is so responsive in getting back to us and helping us problem-solve. They’ve definitely been a great partner to have.” The responsiveness and practical solutions have helped Whitney Center get more value out of Sage Intacct cloud accounting software and its broader technology ecosystem.

Empowering Staff Through Technology

Staff found Sage Intacct’s reporting and platform intuitive and flexible, even for the



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non-technical users. “It’s easy to understand if you have experience with a more basic accounting platform like QuickBooks, Peachtree, or Great Plains. On top of that, the reporting is great and very flexible, and we’re able to write whatever report we can come up with.”

Intellitec worked to facilitate a smooth transition to Sage Intacct while enabling staff to quickly adapt to the new platform. “It was easy and seamless. Getting used to a new accounting system is always a learning curve, but because it’s so much like simpler systems that a lot of people have exposure to, the learning curve was not as steep as when we were trying to onboard people to something like MatrixCare.”

Improving Confidence & Engagement

Moving to Sage Intacct saved time for the accounting team by simplifying corrections and reducing the amount of work required



to fix errors. “There’s a little more comfort in that if somebody makes a mistake, it’s not like it’s written in indelible ink. There’s always the possibility to fix it, and people are less gun-shy to push the button and post something. There’s definite time savings there,” explains Matist.

Whitney Center’s team quickly became more comfortable working in Sage Intacct. Matist says, “It’s a lot easier to use. It doesn’t feel like if you click something, you’re going to break something irreparably. It eases people’s comfort, knowing that it’s flexible. Knowing that I’m able to go back and fix.” Unlike before, staff no longer feel hesitant to complete tasks or post transactions out of fear of time-consuming mistakes.

From Dashboards to Better Decision-Making

Whitney Center saw strong adoption across departments thanks to Sage Intacct’s dashboards and reporting tools that were intuitive for everyone to navigate. Especially since it includes simple visual cues that make it easier to drill down to get more information. “That is an impressively simple thing that makes a huge difference for someone who is just trying to figure out how much they spent on paperclips last year,” affirms Matist.

Whitney Center also improved visibility and engagement by working with Intellitec to create custom manager dashboards within Sage Intacct. Matist says, “Now managers are not relying on us to distribute it. That’s huge because they’re getting their information at their fingertips. They don’t have to ask for it, which is great.” Managers now enjoy greater ownership over their business lines and spending decisions.



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Saved 30 Days Annually Just in Requests

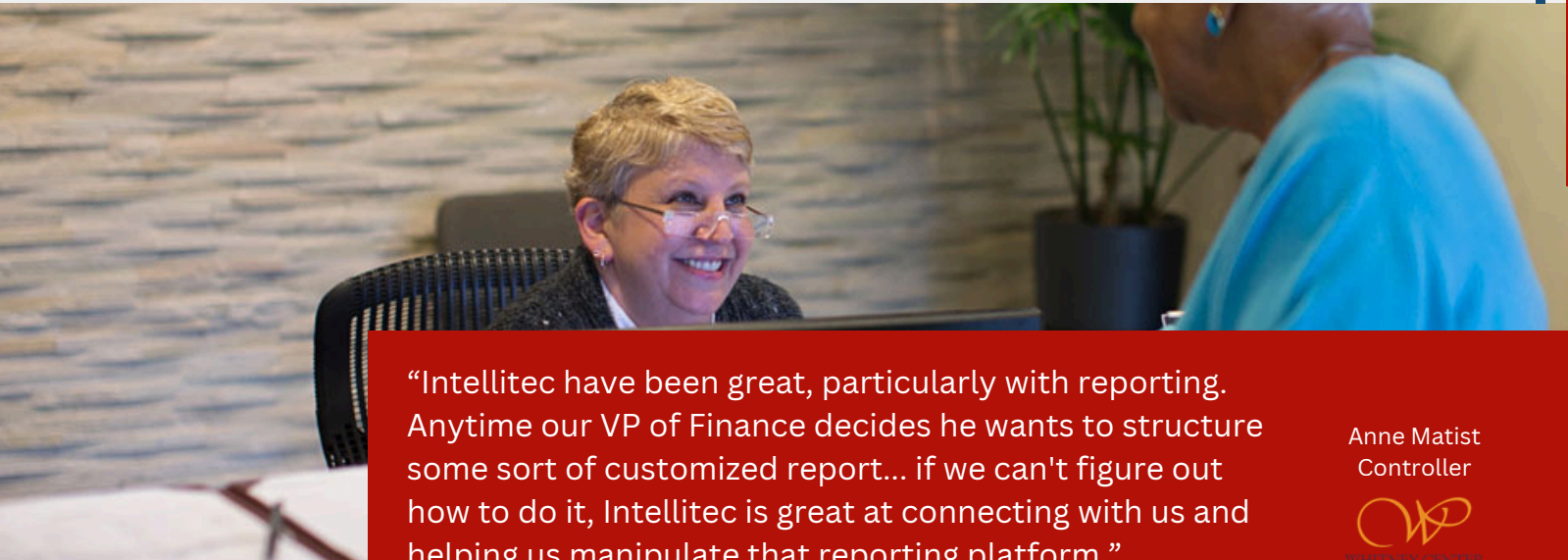
The improved access to data significantly reduced reporting requests, easing the administrative burden on the finance team. This has saved Matist an estimated 20 hours per month, or 30 days over a full calendar year.

The finance team is also enjoying the shift from manual tasks to focusing on higher-value analysis that uses their expertise and moves the needle. “This frees us up to be more analytical and look at things like how much we’re spending per meal, what time of day, and whether we’re having more customers access our dining venues.”

A Partner That Gets Senior Living

One of the biggest advantages of working with Intellitec was that the team already understood senior living operations. They know the unique challenges of CCRCs and healthcare-related cloud accounting software. “Not having to constantly explain our industry and what we do is definitely a benefit,” emphasizes Matist.

Intellitec also played an important role in helping the organization build customized reports, improve integrations, and troubleshoot connected systems. Matist elaborates, "They've been great, particularly with reporting. Anytime our VP of Finance decides he wants to structure some sort of customized report, like wanting to see how many FTEs we have working per shift, per department, if we can't figure out how to do it, Intellitec is great at connecting with us and helping us manipulate that reporting platform."



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Enhancing Resident Care

The time savings gained through Sage Intacct have created ripple effects across operations. "When you have time to slow down and not put out fires, or not be responding to one-off requests constantly, you have the time to think about how we're doing things and whether we could be doing them better," elaborates Matist.

With Intellitec's support, the team has found more time to launch new initiatives. Matist highlights, "We decided to start a business line providing occupational therapy for people suffering from dementia in their apartments. Having the flexibility to analyze that business line made that possible."

She continues, "We were able to take a look at our accounts payable processes and easily make the decision to start using an OCR platform that plugs into Intacct, to kind of

take more of the labor off our hands and onto technology." By continuing to free staff from repetitive manual tasks, they can focus more on strategic planning and growing the continuum of care to residents.

A Responsive, Long-Term Partner

Over the years, what has stood out about Intellitec is their knowledge of the industry and their expertise in connecting platforms used in senior living. As Matist comments, "They're helpful, knowledgeable, and easy to work with. They're super responsive. If something does require a little bit of an extra charge, it never feels like we're being nickel-and-dimed. It's very reasonable."

For Whitney Center, having a partner who truly understands senior living operations has made a lasting impact well beyond the initial implementation.

