

Success Story

Paperless finance helps Hunter Health cure inefficiencies with Sage Intacct



“There’s no financial system better than Sage Intacct when it comes to analyzing data across multiple dimensions.”

Lora Winchell
CFO, Hunter Health

Hunter Health is the oldest Federally Qualified Health Center (FQHC) and Urban Indian Health Clinic in Wichita, Kansas. Founded in 1976, the multi-location nonprofit offers high quality, affordable medical, dental, behavioral health, and health education services to 14,000 patients in underserved communities. The organization’s \$12 million budget is funded equally by patient revenue and grant revenue, which comes from several state and federal agencies.

According to the United States Department of Health and Human Services, these types of community health centers deliver valuable services to 1 in 12 citizens, regardless of their ability to pay.

Key Outcomes

- Kept up with 40% revenue growth, while maintaining a lean accounting team
- Increased finance team efficiency by 75%, reduced overhead costs by \$100,000
- Shortened month-end close by 67%
- Simplified federal compliance with multi-dimensional grant reporting

Sage

Organization
Hunter Health

Location
Kansas, US

Industry
Nonprofit

Sage Products
Sage Intacct



**HUNTER
HEALTH**

About Hunter Health

Hunter Health is the only Urban Indian Health Program in Kansas, addressing the needs of underserved patients through medical, dental, behavioral health, and health education services.

Bracing for increased federal scrutiny

As this model's reach expands, so does the scrutiny of federal regulators. "Organizations like Hunter Health must show exactly where and how our funding is spent to meet the government's strict requirements," said Lora Winchell, Hunter Health's CFO. "These are big dollars, so compliance is critical, but if your general ledger doesn't differentiate funding sources it can be very difficult. Before Sage Intacct, our team tried to extract data from Microsoft Dynamics GP and organize it using Excel, but our ability to segregate financials by grant was so limited, we were always in reactive mode."

The center's finance team decided to migrate to a modern, cloud-based solution that could provide visibility by department or by grant and help them transition to a paperless environment. After selecting and implementing Sage Intacct, they were able to keep up with Hunter Health's 40% revenue growth, as well as federal reporting expectations, even while reallocating half their headcount to other parts of the organization. The new financial management system increased team efficiency by 75%, shortened the month-end close by two-thirds, and offered greater operational insight to support decision-making.

Supporting 40% growth with half the headcount

When Winchell joined Hunter Health, she leveraged her public accounting background and Sage Intacct's sophisticated workflows to help eliminate tedious, manual tasks and adopt best practices. By using the cloud solution to decentralize purchasing, automate monthly bank reconciliations, and streamline grant reporting, the organization was able to cut its month-end close from a full month to under ten business days. This transformation led to a major boost in team productivity, saving the center around \$100,000 in annual overhead costs.

"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," noted Winchell. "We no longer need paper backups or a full-time A/P clerk to manage vendor invoices, and our budget owners enjoy having more control over their spending."

In addition, with simple imports from bank files and the click of a button in Sage Intacct, the team revamped what used to be a cumbersome five-day process of manually reconciling multiple bank statements each month. Now, they can reconcile the many cash payments Hunter Health collects from patients in less than an hour. Sage Intacct also saves time by allowing the team to directly upload credit card statements and payroll entries, as well as move from physical journal entry sign-offs to tracking approvals right in Sage Intacct.

Managing the bottom line proactively with data-driven insights

Beyond producing financial statements efficiently each month, Hunter Health's finance team appreciates how Sage Intacct's multi-dimensional capabilities enable them to generate a

wide variety of operational and compliance reports within minutes—all without using Excel. The system's flexible general ledger structure provides end-to-end visibility into organizational performance, with the ability to slice and dice profit and loss statements by funding source (specific grant, Medicaid, self-pay, or private insurance), expense classification (restricted vs. unrestricted), department (dental, optometry, etc.), project, service type, or location. With this granular insight at their fingertips, they can deliver timely board reports and better inform key decisions.

For example, Hunter Health was able to accelerate the hiring of a new full-time dentist, by comparing the increase in costs against potential revenue coming in from additional patient visits. And the grant writing team can quickly determine whether it's a good financial choice to pursue new opioid-related grant opportunities, based on current or planned salaries, supplies, and expected demand for Hunter Health's substance abuse services.

Sage Intacct automatically pushes 25 budget-to-actuals reports to grant and department managers every month, which they use to monitor expenses and address any budget variances in a timely manner. "With Sage Intacct's user-based permissions, we can empower our managers to take accountability for their spending and program results," said Winchell. "Our departments have the best firsthand knowledge of what they need, so they each build their own budgets and proactively manage their part of the organization. And grant managers can now make adjustments throughout the year if needed, rather than waiting for us to put together grant reports when compliance time comes at the end of the quarter or year."

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