# Customer Profile

## Executive Summary

**Previous solution:**

- QuickBooks

**Results with Intacct:**

- Scaled easily with 3X revenue growth
- Saved 50 hours/month of duplicate data entry
- Halved monthly close process
- Software paid for itself in <3 months based on business value

*❝ I've worked with several different accounting and ERP systems over the years – including QuickBooks, Sage Peachtree, and Microsoft Great Plains – but none of them come close to offering the user-friendly capabilities and granular visibility we have with Intacct. In the time we've been on the system, we've sped processes, increased data accuracy, and improved reporting without increasing our accounting staff. As a result of all the business value Intacct delivers, we estimate that the software pays for itself in under three months each year. ❞*

**–Jay Jackson, CFO, CareATC**

## Graduating to Robust Cloud ERP

CareATC provides primary healthcare, acute care, and chronic disease management to employers through on-site, near-site, and shared-site clinics in seventeen states. The company manages these medical care centers, charging administrative fees and pass-through costs—including clinician, lab, and pharmacy expenses—to each corporate client. With 3X revenue growth over the past three years and thousands of transactions each month, CareATC quickly outgrew its QuickBooks accounting software and decided to establish more sophisticated, automated financial processes.

The company selected Intacct's best-in-class ERP solution to meet its needs. Jay Jackson, the CFO at CareATC noted, "I'm a big fan of cloud solutions like Intacct that eliminate IT maintenance needs. In addition to the system dramatically streamlining all of our financial workflows, we enjoy its regular software updates, reduced hardware costs, and top-notch security."

## Ensuring Data Accuracy through Scalable Processes

Since making the switch to Intacct, CareATC has optimized its accounts receivable and payable processes, including complex pass-through client transactions. The finance team can now easily upload data from suppliers, as well as the company's Concur and Paylocity systems, directly into Intacct, which saves around 40-60 hours of data entry each month and ensures more accurate financial information. In addition, the team halved its monthly close and saved even more time by using Intacct to automate expense allocation for shared-site clinics that serve multiple clients.

All of this increased productivity also translates directly to cost savings. For example, CareATC avoided hiring at least two full-time accountants it would have needed to keep pace with its growth—at a savings of around $100,000 per year. These efficiencies are augmented by a team from Intacct consulting

partner, BTerrell Group, which supports the company's financial software configuration needs.

"BTerrell has been a great partner, and we give them high marks when it comes to responsiveness and their knowledge of Intacct. Everyone has been easy to work with, and very helpful with enhancing our financial automation and reporting," shared Jackson. Next up, the team plans to implement Intacct's purchasing software, which will streamline CareATC's purchase requisitions, purchase orders, and approval sign-offs.

## Improving Financial Performance with Granular Visibility

The company uses Intacct to increase financial visibility across the organization as well. Each clinic manager and territory director has a personalized read-only financial dashboard in Intacct, where they can easily view accurate profitability margins and income statements for their individual areas of responsibility. This real-time visibility into monthly, quarterly, and yearly performance against budgets and prior periods has greatly increased accountability and reduced ad hoc reporting inquires to the finance team.

CareATC's executives also benefit from their own Intacct dashboards with additional financial and operational information, such as cash balances and a full corporate balance sheet. "The powerful visibility we have in Intacct has really improved our overall financial performance. Every manager in the company is now aware of their spending, and has the financial insight they need to manage the business day-to-day," said Jackson. "We especially value Intacct's dimensions capability, which lets us easily tag transactions in order to group, compare, and analyze our data by customer, by clinic, by territory, or even by clinic type."

Jerry Turner, CareATC's controller continued, "We love how easy it is to write reports in Intacct, with the ability to slice and dice our data by all kinds of criteria. Many of the Intacct reports we rely on most would be impossible to create in QuickBooks, and would've required a programmer if we were on a system like Microsoft Great Plains." By improving reporting in this way, as well as by spending less time on tedious accounting workflows, the finance team has increased its focus on long-term planning and proactive budgeting.

## About CareATC

CareATC is a healthcare provider that partners with employers to help them take control of rising healthcare costs by improving the health of their workforce. The company's vision is to promote health, prevent disease, and provide a shorter path to care.

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