

CASE STUDY

Cloud accounting: the backbone of successful financial performance for Southeastern Spine Institute



The Southeastern Spine Institute (SSI) is the largest medical practice in South Carolina, specializing in spine-only care. Founded in 1991 as Carolina Spine and located in Mount Pleasant, SSI provides state-of-the-art spine MRIs, digital X-rays and most forms of diagnostic equipment to help determine their patient's problem-focus areas. The medical facility is made up of multiple non-surgical treatment rooms and block suites, along with an in-house Pharmacy and Physical Therapy Center, exclusive to spinal-related problems.

As the healthcare practice has matured over the last 28 years, SSI was in need of an accounting system that would keep up with business growth. Glenn Taylor, Accounting Manager at SSI, along with the rest of the finance department, worked with Dean Dorton to evaluate and implement a cloud accounting solution that has the ability to equip their business with the flexible reporting capabilities they needed.

The Challenge

Prior to Sage Intacct, SSI was using Creative Solutions Accounting and Creative Bookkeeping Solutions- accounting software commonly used by CPA firms. This meant the company's CFO and Accounting Manager were using separate software for accounting purposes, making it impossible to collaborate on business data insights.

Data was not easily accessible for the accounting team. The on-premise software did not allow multiple users to be logged in at the same time, requiring the finance team to resort to their own workarounds, such as writing checks, running reports, and other duties. This severely limited business productivity.

"We just started picking up on what wasn't working," commented Taylor. "In order to get to certain data, I had to click this, then click something else, and then something else... If I didn't do it in a specific order, I couldn't find the data I needed."



The company had been recapitalized with a private equity firm and needed to upgrade its accounting system to accommodate rapid growth and add a more sophisticated reporting tool. Intacct offered what we were needing.

Doug Cannon, CFO



Additionally, the staff was spending more than 20 hours a month on manual data entry. Without access to a report writer, data had to be manually exported out of all reports and loaded into SSI's custom-made templates. Deposits also had to be done manually, requiring employees to key in each individual deposit in the system and code it themselves.

Creative Solutions Accounting also lacked proper training and resources for its software, which was a big obstacle for its users. "I got in the system and just had to figure it out—there were no training programs, no instructional videos, no support. I was basically looking at the FAQs to solve my problems," said Taylor.

The Solution

The main reason for SSI's transition to Sage Intacct was that Creative Accounting Solutions decided to no longer supply any more servers. The program announced that no more enhancements or upgrades would be made to the product, and that sometime in the future, the software would no longer be serviced.

SSI was using Webster Rogers, leading CPA firm in South Carolina, and one of Dean Dorton's top referral partners. Webster Rogers had highly recommended Sage Intacct and Dean Dorton to SSI.

With cloud-based Sage Intacct, SSI was able to adopt and use the reporting module, which eliminated all manual data entry by the finance department and allowed for smoother reporting overall.



Going through and learning the report writing, I've found that you can get whatever data you want," commented Taylor. "I love that there's that level of customization where you can choose which categories of reports you want to show.

Glenn Taylor, Accounting Manager



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Results with Sage Intacct

Besides the efficiency of the report writer, SSI is benefiting from Sage Intacct's Import Module, which allows the software to extract data from other systems. This is proving invaluable to the finance team, saving them over 20 hours a month in manual data imports.

Another advantage for SSI is the functional way they can coordinate financials between employee levels. In any healthcare organization, there are doctors and regular business employees, each with their own expenses. With Sage Intacct, SSI can assign expenses or revenue directly to a specific doctor, which has been extremely important to the business thus far.

Sage Intacct has additionally allowed SSI to segregate duties based on different levels of accessibility. "When we had Creative Accounting Solutions, everyone had access to either everything or nothing. Anyone could have entered bills or written a check," said Taylor. Now, SSI has the ability to give certain tasks and accessibility to specific levels of employees, making business data more secure.

Overall, SSI needed a cloud-based solution that would give multiple users access to financial data, a flexible report writer, and automated accounting capabilities that can keep the segregation of employee duties in line. They also needed a modern system, with access to support and training resources.

"The cloud is a turn in the right direction," said Taylor. "It's accessible anywhere and anytime, which is huge. If I have to stay home, I can log in at my house and the data is the exact same."



You don't realize all these limitations you had until you use a system that's smooth and easy to use.

Glenn Taylor, Accounting Manager



Why Dean Dorton?

After Webster Rogers highly recommended Sage Intacct for SSI and Dean Dorton as a partner, Dean Dorton was able to provide SSI the proper services to implement Sage Intacct quickly and efficiently.

"We chose to work with Dean Dorton because they provided a superior product [Sage Intacct] for a reasonable price," mentioned Taylor. "At first, we were concerned about some of the features in Sage Intacct that wouldn't apply to us. However, we learned exactly what we would need and Dean Dorton streamlined it with us—without being pushy on modules that didn't suit us. Our experience so far has shown that we made the right decision."

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