

# rinehimerbaker Success Story

## Sage Intacct Customer Profile

**Customer:** Florida - based Medical Service Organization

**Location:** Jupiter, FL

### Customer Profile:

For over 25 years, a Medical Service Organization has provided a comprehensive business approach to primary care physicians in the Medicare industry. Throughout South and Central Florida, the company helps primary care practices navigate through the complexities of Medicare, including by providing services and resources necessary to achieve long-term and robust growth. The primary focus has been on Medicare Advantage partnerships exclusively with HUMANA/CarePlus plans.

We believe that optimal healthcare delivery relies on innovative technology and sophisticated management practices. At its core, our company mission is based on a proactive emphasis on wellness while our business model applies best practices at every stage of healthcare delivery to improve patient experience. As a result, we maximize profits with our physician partners and deliver high-quality medical care to those who need it most.

### Project Description:

The medical organization previously used QuickBooks to maintain their accounting books for 10 entities. rinehimerbaker migrated them from QuickBooks to Intacct with an integration with Avidxchange and ADP, which provided real-time visibility (cross-entity) into company status, accounts payable work flow and payment automation and an ADP direct payroll integration into the general ledger.

### Client Perspective:

*“As a CFO, for a growing, acquisitive company, I wear many hats. Each day is an adventure. We need to act fast and make decisions based on accurate data. When we spend time waiting and watching for data we lose on opportunities. Our immediate benefits were: a time savings of 20 plus hours per month in report preparation and accounts payable process efficiency, we were able to deliver real-time status to our CEO to facilitate strategy decisions, automated integration with Avidxchange eliminating risk/mistakes while improving controls, integrated payroll saving time on inputs, most of all our accounting employees were happier, as they enjoyed using the system.”*

– Brian McGreevy, Chief Financial Officer

### Key Requirements:

- Facilitate real-time visibility into the company and its financial status through the use of real time, dashboards and integrated reporting.
- Improved financial controls capabilities through customized user permissions.

#### Key Challenges:

- There were multiple Quickbooks files that were not integrated and did not provide sufficient reporting capabilities to give the organization management the visibility they desired.
- Financial controls were manual due to the lack of capability within Quickbooks.
- Accounts payable processes were manual and time consuming.

#### Key Outcomes:

- Created 20 plus hours per month in report preparation and accounts payable process efficiency.
- Delivered real-time status to stakeholders facilitating strategy decisions.
- Automated integration with Avidxchange eliminating risk/mistakes while improving controls.
- Integrate payroll.
- Scalable financial management solution to grow.

#### About rinehimerbaker, llc

**rinehimerbaker, llc** is a leading accounting firm and technology consultant serving growing businesses in Florida and throughout the Southeastern United States. We formed rinehimerbaker for entrepreneurial owners and managers who want to achieve more, faster. A partnership with rinehimerbaker will deliver less stress, more time, better accounting and greater results. At rinehimerbaker, we continually work to understand your business enabling us to help you move faster and with greater clarity when opportunities and issues arise. rinehimerbaker is your trusted accounting partner with the expertise and resources to improve results and provide peace of mind. Learn more about rinehimerbaker at [www.rinehimerbaker.com](http://www.rinehimerbaker.com).