

CASE STUDY: MENTAL HEALTH SERVICES AGENCY



TEXOMA COMMUNITY CENTER, SHERMAN, TEXAS—Texoma Community Center provides a wide range of mental health and developmental services for adults, adolescents and children. Its mission is “to promote the accessibility of services that improve quality of life and support self-determination for persons with mental and developmental disorders.”

The organization offers a community-based system of effectively coordinated service providers who are committed to eliminating stigma associated with mental and developmental disorders and providing cost-managed services that enhance independence, dignity, and opportunities for exercising personal choice.

THE BUSINESS CHALLENGE

Texoma Community Center had been using a widely-known, legacy accounting software package to perform its accounting tasks and financial reporting, however the organization found that many processes it conducted still needed to be done manually.

“They needed more automation with their processes, but also more flexibility and the ability to integrate with other systems,” said Travers Hough with TLC Help, Inc., an accounting software consulting firm for nonprofits and government agencies and an AccuFund reseller.

The lack of automation created a tremendous time sink with some of the finance department’s regular tasks. For

example, one person had to spend eight hours each week to produce an employee payroll report which included the detailed information they needed on hires, transfers, etc.

Texoma Community Center

When support for their software package ended, Texoma Community Center not only knew they had to seek out a new product, they were ready to find the accounting solution that would meet all their needs.

THE ACCUFUND SOLUTION

Texoma Community Center went live with the AccuFund Accounting Suite in early 2013, implementing the General Ledger, Accounts Payable, Fixed Assets, Payroll and Human Resources modules.

“They realized right away how much more malleable AccuFund is over their previous software and how easily it can be fit to their organization’s needs,” said Hough. “AccuFund is also great at interfacing with other, complementary finance solutions.”

“The AccuFund Accounting Suite is a very intuitive system in terms of how it flows and how you make your journal entries. It just makes sense,” said Don Riddle, CFO at Texoma Community Center. “The biggest factor is its ease of use. It’s set up to be very user-friendly and doesn’t require a lot of training.”

“Users of the AccuFund Accounting Suite don’t have to be computer-savvy,” added Karen King, Controller at Texoma Community Center. “We have a couple users who aren’t, yet

they’re able to navigate AccuFund very easily. The screens in each module look the same, so if you know one module then you can go into any one of the other modules and know how to use it as well.”

The AccuFund Accounting Suite’s Human Resources module allows Texoma Community Center to track all information on their employees, including college degrees, performance goals and performance appraisals.

Screens and reports in the module can be configured to present the information they are interested in viewing for any purpose. This has been a significant new capability, as the employee payroll report they previously developed manually and took eight hours to produce can now be pulled together and run in minutes, then distributed automatically.

Texoma Community Center also has an employee roster report they run with an accompanying set of labels for different departments. Prior to AccuFund, they would have

THE ACCUFUND SOLUTION

to run the labels through a separate label system, which meant entry work had to be duplicated in the label system to create the labels. AccuFund allows them to create this report and the labels in minutes, saving another eight hours of work every two weeks.

Texoma Community Center also figured out a way to use the HR module to create name badges for its employees. They had wanted to assemble a standalone laminated photo system, and with AccuFund they were able to do that using a form to set up the badge, add the employee photo and attach the QR code linking to the organization's website. AccuFund also prints the badge and then it's laminated.



Using the AccuFund HR module, Texoma Community Center has also been able to scan all employees' documents into their records so they can go into the system and see the documents without having to dig through employee folders.

GLOWING FEEDBACK ON ACCUFUND

"Every time we go to a CFO conference, we always talk about the AccuFund Accounting Suite and speak highly of its capabilities," said King.

"I would recommend AccuFund to any of the other mental health centers in the state and have even offered to provide

Texoma Community Center has complicated cost allocations and a complex budget which the AccuFund Accounting Suite enabled them to do more easily. Using AccuFund, they were able to do a change-over of account numbers from 2-digit to 3-digit reporting units (department numbers), set up a system to handle employee time-off (PTO), and interface with their cost allocation system required by the state of Texas.

"With the AccuFund Budget Development module, you can just pull in your year-to-date numbers, enter your formula and annualize your data, then you can just go in account by account and change what you need to," said Riddle.

"Shortly after I assumed the role of CFO, I learned my budget was due to the state in 10 days. Because AccuFund is so user-friendly, I was able to easily extrapolate the data I needed, pull it all into my Excel file with the F9 functionality and get my budget out. I was able to turn my budget around in less than 10 days."

AccuFund also provides Texoma Community Center with the ability to create custom reports, such as their overtime report on employee overtime hours and their employee roster reports.

"I know which fields to go into to create the reports we need," said King. "I can just export an employee roster into Excel and then go into Word to do a mail merge to create our employee time sheets every pay period. It's just the click of a button."

a site visit," said Riddle. "AccuFund is the software package for any organization that is interested in becoming more efficient, making processes automatic, simplifying manual procedures, and getting rid of numerous spreadsheets."

LEARN MORE ABOUT ACCUFUND

Visit our website at www.accufund.com, call your local reseller, or contact our Sales Department at 877-872-2228. We would be pleased to discuss this case study, explain the

benefits of AccuFund for your fiscal department, and put you in touch with a local reseller certified to install and support the AccuFund Accounting Suite.