

Netsmart Technologies, Inc.

PROPHIX Case Study

Quick Facts

Industry

Technology: Software and services for health and human services sectors

Company Info

- Operating since 1968
- Employees: 400
- Based in Great River, New York

Benefits

- Gained ability to create reports independently
- Enhanced data integrity with quality control checks
- Gained more time for analysis on budget and actual variances

“After comparing a variety of products, the decision was easy; PROPHIX was a lot more capable. All of PROPHIX’s capabilities would take three or four different modules of Great Plains, such as FRx Reporting and FRx Forecasting. I looked at pricing, implementation, and timing, and it came down to PROPHIX was the right decision for us.”

*--Michael Littman
Director, Business Analysis, Netsmart*



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The cumbersome Excel-based budgeting and reporting tasks prompted Netsmart to seek a better solution. After choosing PROPHIX over FRx and Helmsman, they are now able to budget, report, and analyze data on the fly—all within a single application.

Background

Netsmart Technologies, Inc. is a software firm that provides on demand and traditional software solutions for a variety of health and human services sectors: Behavioral Health, Mental Health, Public Health, Vital Records, Substance Abuse, Methadone, MR/DD and Social Services. Netsmart helps automate key financial, clinical and management processes for more than 18,000 organizations to help them improve the quality of life for millions of consumers.

Recognizing the Problem

Netsmart’s biggest problem was that Excel was used for all of their budgeting and reporting tasks. “Excel was very cumbersome and it was difficult to perform analysis on budget versus actual,” says Michael Littman, Director, Business Analysis, Netsmart. Their process involved the Accounting department who had the responsibility to generate the reports amongst their

many other regular functions. Michael describes, “It was very difficult for me to do anything independently without having to rely on other people for information.” Overall, Netsmart’s current system with Excel was taking too much time and causing too many inefficiencies. A better solution was needed to improve their processes.

Implementing a Solution

A report on CFO.com provided a comparison of budgeting software applications and from that, Michael Littman considered PROPHIX, FRx, and Helmsman solutions. Following additional research, Netsmart decided to implement PROPHIX. Michael describes, “The decision was easy; PROPHIX was a lot more capable. All of PROPHIX’s capabilities would take three or four different modules of Great Plains, such as FRx Reporting and FRx Forecasting. I looked at pricing, implementation, and timing, and it came down to PROPHIX was the right decision for us.”

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—Michael Littman
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The plan to completely migrate from Excel to PROPHIX for all budgeting and reporting was outlined in a phased approach, implementing PROPHIX over time. “To start off, we continued to distribute Excel budget templates and used PROPHIX to consolidate the data. We didn’t have the resources at the time to fully implement PROPHIX’s workflow capabilities, so we maintained our existing data input distribution process,” explains Michael.

During the first phase of implementation, Netsmart worked with a PROPHIX implementation consultant who had practical business knowledge and was able to provide some recommendations on some of their challenges. “Our consultant was great to work with. He was extremely knowledgeable; he offered great concrete approaches on how to move forward from certain issues,” says Michael. “Plus, project management with PROPHIX has been extremely favorable. With other companies, projects never ended and priorities shifted for the benefit of their business rather than ours. With PROPHIX, we have a starting point and a defined end point—as well as accurate time estimates.”

Benefits

One of the main challenges during Netsmart’s executive meetings was the difficulty to quickly pull historical information. “Often times, there would be a material difference between historical and the proposed budget numbers, so a typical question would be ‘what comprises the historical information?’” describes Michael. To find this information, they would ask the Accounting department to generate the report in the midst of their ongoing responsibilities. Michael continues, “Now, I’m able to create a report with historical information

directly in PROPHIX and pass it on to department managers. Plus, I can drill straight through into Great Plains and immediately show them every single item in the expense category.”

Having the flexibility and the capability to pull the data has saved Netsmart a lot of time and energy. “The data is now at my fingertips. I can dive into PROPHIX to pull the data, which also gives me a quality control check on the numbers,” Michael explains. “I now have more time to do analysis on the variances between budget and actuals and generate reports for our different department managers with a detailed information write up concerning their reports.”

Bottom Line

PROPHIX has allowed Netsmart to focus on more important tasks. Michael explains, “Now with the capabilities of PROPHIX, I have time to do things that I wouldn’t have been able to do before, such as improve the quality of our reports. I’ve also been able to add more high quality value to the process than we ever had time to do previously.” PROPHIX has helped improve the overall process; board meetings are more effective, multiple budget versions and revisions can easily be made, and the executive committee has more time to review the results.

Future Plans

Netsmart expects to completely migrate away from Excel spreadsheets and move towards data input by department managers directly into PROPHIX. Michael concludes, “Our processes will improve even further once everything is retained in PROPHIX; we won’t need to worry about the various spreadsheet challenges nor the inadequate version control currently in our Excel-based budgeting.”

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