



Family Health West

Multiview ERP Case Study

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Background

Nestled in Colorado's Western Slope, Family Health West provides top-notch healthcare to a rural community. With 25 inpatient beds and a team of 40 to 50 in-house physicians, this critical access hospital focuses on primary care, offering specialized orthopedic, podiatry, pain management and other services. In addition, Family Health West manages a 40-bed assisted living facility in an area with three other prominent hospitals.

As **CFO, Theresa Tabor** leads a team comprised of a controller, an accounting manager, a financial analyst, one account payable personnel, and a cash receipts specialist. A dedicated team of six accounting professionals drives the financial engine at Family Health West.

Selection

Family Health West originally selected Multiview as their ERP in 2014, and they report that one standout feature was the ViewSource360 functionality. This capability was groundbreaking, particularly when dealing with electronic health record (EHR) systems where data accessibility can be tricky. The reporting and data analysis capabilities provided by ViewSource360 set Multiview apart from the competition, making it the preferred choice for Family Health West and its finance team.

Challenges

When Theresa joined Family Health West in early 2023, she found they had been using Multiview ERP for almost ten years. A power user of Multiview ERP, Theresa knew that it struck the right balance of financial sophistication without unnecessary complexity or costs, making it the continued strategic choice for the organization's specific needs. In her experience, Family Health West just needed to improve and expand the ways Multiview ERP was being used.

In her assessment, she noted that the chart of accounts created in 2014 presented opportunities for optimization, which could lead to enhanced financial clarity and operational effectiveness.

This led to a complex structure with **around 3,300 accounts**, causing **financial statements to take up to 60 days to produce** after the books were closed. The detailed breakdown in the general ledger structure made it hard to understand and manage the accounts efficiently, resulting in delays in obtaining accurate financial information for decision-making.

Additionally, there was a lack of transparency in sharing information between clinical and operational managers, hindering their effective departmental management. All information had to go through accounting, causing delays and a disconnect in decision-making.

"The capabilities that ViewSource 360 offers in reporting and number crunching are truly unique, especially when you're working with data from EHR systems where it can be challenging to extract information."

Theresa Tabor, CFO



Improvements/Efficiencies

After identifying the challenges, Theresa led a major overhaul of the related accounting data (RAD) setup, slashing the number of accounts from 3000 to around 800. This revamp, completed in August 2023, streamlined the financial reporting process, **cutting month-end closing time from 60 days to just 15, a 75% decrease.**

Theresa stresses the importance of the RAD structure for boosting efficiency and accuracy in financial management. She is an advocate for creating customized reports for extra flexibility and transparency, rather than sticking to pre-configured templates.

Leveraging her expertise in using Multiview, Theresa untangled intercompany issues and boosted transparency, empowering clinical and operational managers to oversee their departments more effectively. Managers are now able to access and analyze their department's financial statements and manage budget requests within the system, marking a significant departure from the previous reliance on Excel. Those Managers now express newfound delight in the ability to access and review invoices through Multiview, making them more effective in their day-to-day business functions.

By eliminating unnecessary detailed ledger entries and introducing automated reports, various processes that include end-of-month payroll accrual, became more efficient. Collaborating with the Multiview team helped to streamline bank reconciliations and address inefficiencies, positively impacting the organization's operational efficiency, benefiting requisition and order processes.

"I consider Multiview to be like an additional team member on my bench that I can rely on."

Theresa's knowledge of and drive to improve Multiview ERP functionality within Family Health West increased adoption and helped generate enthusiasm for the solution in other departments.

Theresa praised ViewSource360 for its robust data integration capabilities across various EHR platforms, empowering her organization to create thorough reports that combine insights from both operational and financial data. This deep level of integration and data transparency was transformative, allowing Theresa's team to make more informed decisions.

Theresa's faith in Multiview's ease of use, ViewSource360, and transparency has elevated Multiview ERP to Family Health West's go-to strategic partner for driving operational excellence and top-notch financial management.

"When I talk to my peers, I always say that simplicity, ViewSource360, and transparency are the biggest things that I think Multiview ERP can provide to benefit organizations in any industry."

"When asked about potential improvements, I wouldn't change a thing about my 10-year partnership with Multiview."

Theresa Tabor
CFO

The time to produce financial statements was reduced from **60 days** to **just 15 days** after the close of the reporting period, a **75% decrease!**

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