



CASE STUDY



CROSSROADS HOSPICE

Crossroads Hospice Leverages Business Central & Solver for Greater Impact

Hospice and palliative care organizations require reporting and planning functionality that sets them apart from other healthcare providers. Discover how Crossroads Hospice is gaining efficiencies with Microsoft Dynamics 365 Business Central and Solver.

THE SITUATION



Crossroads Hospice is a leading provider of hospice and palliative care that operates 11 locations in seven states. As the organization has been growing, they realized their previous accounting tool couldn't keep up.

THE SOLUTION



The management team sought out a modern, advanced financial system that could speed up the reporting process and streamline other management processes. Crossroads Hospice selected **FORVIS** to help them design and implement Microsoft Dynamics 365 Business Central and Solver.



THE BENEFIT



Since implementing Dynamics 365 Business Central and Solver, Crossroads Hospice has experienced immediate benefits. From significant time savings to increased internal controls to report automation, the benefits are freeing up resources to focus on even greater community care. The biggest advancement so far has been the time savings created by automating monthly Board reports—reducing the time required to produce the reports from more than two days to approximately 10 minutes.



“The multi-entity management functionality in Business Central lets us consolidate data from our 11 sites, which is critical for our reporting needs,” Buxton says. “It also allows us to set up and use dimensions to categorize entries. The data automatically syncs and rolls up to the general ledger, which helps keep our financial reports and analyses accurate.”

– Laura Buxton, Project Manager



THE FULL STORY

Carrefour Associates is the management firm for Crossroads Hospice, a leading provider of hospice and palliative care operating 11 locations in seven states.

Laura Buxton has been with Carrefour Associates for more than 21 years. She served as the controller for 18 years then transitioned to her current role, project manager, enabling her to focus on special projects for the Board of Directors.

When she and the management team realized they were outgrowing their previous accounting tool, they researched different business management and enterprise resource planning (ERP) systems. Building upon an established relationship they had with FORVIS professionals, Buxton and her team chose the Business Technology Solutions team at FORVIS to implement their new ERP system along with a corporate performance management tool, Solver.

As a hospice and palliative care organization, Crossroads Hospice understands the challenges of managing multiple software programs and using spreadsheets for operational planning and reporting. That's why they selected Microsoft Dynamics 365 Business Central, a scalable and secure ERP system designed to integrate well with other systems and provide organization-wide visibility.

With Dynamics 365 Business Central, Crossroads Hospice can leverage the stability and security of a Microsoft Cloud solution, while benefiting from all the features they need to run hospice operations. This includes managing multiple entities, which is one of the features Buxton values most.

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Another feature Crossroads Hospice values is subledgers. This option wasn't available in their previous accounting tool. Subledgers can help support accuracy, organization, control, and financial agility. With the Solver tool integrated with Business Central, Buxton can run and automate various subledger reports based on specific goals and workflow procedures.

Hospice and palliative care organizations require specialized reporting and planning functionality. From revenue and payroll templates to subledger reports, Business Central and Solver allow Crossroads Hospice to seamlessly track their important metrics and easily pull together data for more in-depth reporting and planning.

Another benefit of Business Central for Crossroads Hospice is the security user groups provide. User groups determine the permissions and permission sets that apply to each group. This out-of-the-box, yet configurable, functionality helps Crossroads Hospice control access to the information that's available in the ERP system.

FORVIS helped Buxton configure user groups and train team members how to use Dynamics 365 Business Central. At first there was a learning curve. Even with controlled access, team members needed to learn how to navigate the new, more advanced system. Through training and with considerable help from Buxton, Crossroads Hospice is now saving time and reducing errors with Business Central and Solver.

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In particular, Solver created the biggest efficiency—the monthly Board reports are now automated. Previously, Buxton would build the reports in Excel. Exporting, filtering, and compiling data and then making sure each executive team received pertinent reports would take more than two days. Now, using Solver, it takes Buxton only about 10 minutes to run and send the reports.

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Since implementing Business Central and Solver, Crossroads Hospice has seen immediate benefits. From automatic updates to increased internal controls to significant time savings, the enhanced functionality is helping the organization report on metrics that different departments

need to act on. Plus, with organization-wide visibility of operations, multiple site and location management, and business intelligence capabilities, Crossroads Hospice can make data-driven decisions and manage their inventory and purchases with ease.

Next, Buxton and the FORVIS team will be integrating Power BI to combine data from Business Central and Solver to create executive dashboards.

With features like accelerated financial close, improved forecasting, real-time performance metrics and reporting, and compliance management, these ERP and advanced reporting tools can help hospice organizations transform how they work. Through digital transformation, hospice care providers like Crossroads Hospice can unlock time savings, operational efficiencies, and process improvements to have an even greater impact on community care.

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Business Technology Solutions

FORVIS' Business Technology Solutions can help support digital transformation across your organization with enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

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