



## Kraft Enterprise Systems Helps Passport Health Find the Ticket to Efficient Budgeting



**P A S S P O R T**  
HEALTH  
COMMUNICATIONS, INC. •

### Client:

Passport Health  
Communications, Inc.

### Challenge:

Budget processes are run on Excel spreadsheets, resulting in budgeting inaccuracies, reporting bottlenecks, and difficulty meeting board requirements.

### Solution:

Passport enlisted the help of Kraft Enterprise Systems to implement the Adaptive Planning solution.

### Results:

Less time spent in the budgeting process, increased accuracy in reporting, and more effective involvement of department heads in the budgeting process.

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### The situation:

Passport Health makes financial operations easier for hospitals and doctors' offices by providing a complete revenue cycle solution—including insurance eligibility verification services—over the internet. But until a year ago, Passport's own financial activities were in need of streamlining.

"When I came to Passport, our budgeting process still ran on Excel spreadsheets, and it could be painful," recalls Kate Gallina, Accounting Manager, Passport Health. "Every time we made a change, we would have to figure out where it linked in dozens of spreadsheets to avoid major problems."

The 13 members of Passport Health's finance staff needed a centralized system that could consolidate all budget information for more accurate results. The staff also needed a way to let business users easily enter their own budget numbers, preventing bottlenecks. And by summer 2006, a new board of directors was presenting Passport with more stringent budget and compliance requirements.

### The response:

In their search for a budget solution, Passport Health turned to Kraft Enterprise Systems, who recommended Adaptive Planning, and Kraft's demos of the solution convinced Passport to look no further.

"As the individual with primary responsibility for managing the budget process, I found Adaptive Planning very easy to use," says Gallina. "We had no trouble convincing all of our planners to use the expense sheets we set up in the system. And we loved the fact that it was hosted on the web with appropriate security features." Kraft had Passport's new budget solution live within six weeks, leaving the company enough time to transfer information into the system for the annual budget process. Today, up to 15 business users across four departments use the system to enter expenses. Even the company's president logs on regularly to view reports.

### The result:

Adaptive Planning's easy-to-use solution enables Passport Health to access and update budget information on a moment's notice—without the need to maintain dozens of linked spreadsheets. On Passport's previous spreadsheet system, the





"With Adaptive Planning, changes are made automatically across the system. That has definitely decreased errors. We've also eliminated the tendency to have various "final" and "final-final" versions of the budget floating around the company for months after the deadline."

—Kate Gallina,  
Accounting Manager,  
Passport Health

finance staff often had to work evenings and weekends to keep up with workload. Today, they can easily meet the annual December 15 deadline for finalized budget information.

**"Adaptive Planning's ease of use has freed up a lot of time for me," says Gallina. "When my boss says, "Let's change this," I can do it in about two seconds.** When we need to change assumptions and formulas for our raises and bonuses, those changes automatically feed back through to all of our plans and sheets. We wouldn't be able to get our budget finished in the current timeframe if we didn't have this tool."

In Passport's previous spreadsheet-based budgeting process, business users typically sent information to the finance department and awaited the results. With Adaptive Planning, the finance department lets the business managers access web pages containing all of their budget information. From there, those managers can make changes and immediately see the impact.

"With Adaptive Planning, our department heads truly own their own budget numbers," says Gallina. "When there's a problem, they can no longer say, "Those are the numbers you gave us." There's a sense that business users now have a say in the company, rather than just following what is mandated."

Although Adaptive Planning has opened up access to Passport Health's budget process, the company's accuracy has only increased. Because the process no longer revolves around error-prone spreadsheets, Passport can more easily trust the numbers.

#### **About Kraft Enterprise Systems, LLC**

Kraft Enterprise Systems, LLC is a Nashville-based, full service consulting firm that assists growing companies with the selection, implementation and support of accounting and enterprise solutions. In addition to offering packages from top mid-market accounting software vendors, Kraft Enterprise also offers integrated solutions for budgeting and forecasting, customer relationship management (CRM), and document imaging and management. The firm's consultants are Microsoft Certified with expertise in a variety of areas, from complex financial reporting to system design.

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