



Client Success

HAWAII DENTAL SERVICE

INSURANCE

HAWAII DENTAL SERVICE TAKES A BITE OUT OF INEFFICIENT PROCESSES



HDS
Hawaii Dental Service

CHALLENGE

Hawaii Dental Service's accounting team had successfully relied on Sage 300 for over a decade when a company mandate prompted a switch to a cloud-based financial management application.

SOLUTION

Trusted business partner Net at Work recommended the switch to Sage Intacct to provide the financial reporting, budgeting, and multi-entity functionality the organization wanted as part of its digital transformation.

RESULTS

HDS streamlined every aspect of its financial operations, freeing over 17 hours of staff time for more strategic tasks.

- Reduced AP processing tasks by 5 hours each month.
- Shortened monthly financial reporting tasks by 12 hours.
- Integration with third-party applications eliminates manual data entry and improves accuracy.

HEALTHY SMILES AND LOCAL ROOTS

Hawaii Dental Service (HDS) has been supporting the oral health of its residents for more than 60 years. With more than one million members and 95% of the state's practicing dentists participating, the nonprofit dental benefits provider is Hawaii's largest and most experienced. HDS earns its customers' trust by providing affordable, comprehensive dental plans that help them live well, smile more.

Like most insurance providers, HDS relies on several industry-specific software applications to support its business. But behind it all stands one agile, powerful, and integrable financial management application and one service-focused technology partner to help the organization meet the dental needs of the community — Sage Intacct and Net at Work.

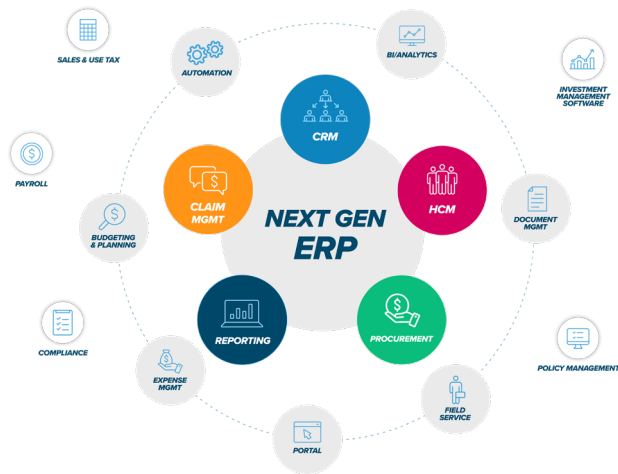
A SERENDIPITOUS SWITCH

Cara Numasaki, as the Controller for HDS, knows the importance of a Digital Operations Platform (DOP), in which a Next Generation ERP, like Sage Intacct, serves as the hub. "Sage Intacct supports our general ledger, cash management, accounts payable, and budgeting functions," she says. "And it's capable of integrating with other business applications to provide us with a cohesive financial management platform." For insurance organizations, a fully-fledged DOP enables them to adapt for fast-changing business needs, leverage Artificial Intelligence (AI) for efficiency and innovation gains, and create accessibility for interactions beyond the browser.

"We had been using Sage 300 for years," says Charise Shigeta, Accounting Manager for the company. "Honestly, we thought we had no reason to switch — Sage 300 worked great for us."

However, the company was moving away from server-based applications to take advantage of the benefits offered by modern, cloud-based solutions. The HDS IT team gave Numasaki and Shigeta a deadline to find a hosted accounting application and find it quickly.

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A sample Digital Operations Platform (DOP) for an insurance company, like HDS, as coordinated by Net at Work. Sage Intacct serves as the core Next Generation ERP solution, with ties to other systems like AP Automation, Customer Relationship Management (CRM), Human Capital Management (HCM) and others.

“We immediately reached out to our technology partner, Net at Work, for advice,” Numasaki says. “They laid out two options for us after a comprehensive assessment. They could either host our Sage 300 on a private cloud server, or we could upgrade to Sage Intacct to produce our own DOP.”

After careful consideration and consultation with Net at Work, HDS made the decision to migrate to Sage Intacct. “We quickly saw the comprehensive benefits Sage Intacct could provide,” Shigeta notes. “We saw opportunities to improve our budgeting process, speed up financial reporting, and simplify multi-company accounting tasks.”

Numasaki and Shigeta say the change has been nothing short of transformational. “We had simply gotten used to the slow VPN connection with frequent outages,” Shigeta says. “And the time it would take to compile and print reports. And the manual accounts payable workflows. Sage Intacct is super fast and always accessible. Simple tasks that used to take minutes — or even hours — are now instant.”

RAPID CONVERSION

With the decision made, HDS and Net at Work quickly sprang into action. While a typical ERP implementation might take upwards of a year from start to finish, HDS had only months in order to meet its commitment to IT.

“Net at Work is fabulous, and they completed the conversion remotely, on time and on budget,” recalls Numasaki. “We definitely have some unique aspects to our operation. They showed us how Sage Intacct is agile and configurable enough to support us.”

Almost immediately following its implementation of Sage Intacct, HDS went through an audit. “The auditors specifically looked at the security protocols and audit trails in Sage Intacct,” Numasaki notes. “We passed with flying colors.”

TAKING A BITE OUT OF INEFFICIENT PROCESSES

Another area where Cara and Charise see positive changes is in accounts payable processing. “Less paper,” Numasaki says. “We currently route invoices outside of Sage Intacct because of our structure and unique situation, however we know that Sage Intacct has the capability to approve invoices within the system and we are working toward using it for that purpose. One great change is that we can finally store invoices electronically in Sage Intacct along with the AP bill.”

“Previously, we’d scan paper documents but had no way of storing them with the accounting transactions,” adds Shigeta. “So, whether the receipts were stored in paper files or in electronic form — it was time-consuming to locate them when needed.”



Now Numasaki can view electronic images of invoices side-by-side with vendor information and general ledger account coding when approving the payment. "This functionality saves me about two hours of review time a month," says Numasaki.

The company recently purchased additional licenses to provide managers and directors with view-only access to specific data in Sage Intacct related to their areas of control. "This will allow them to monitor their department's expenses and research transactions on their own, without reaching out to accounting," Numasaki notes.

In addition to time savings and efficiency gains, the company gains real-time visibility into its actual-to-budget values by managing purchasing requests in Sage Intacct. "We no longer have to wait until the invoice is received to begin tracking the expense," explains Numasaki.

Combined, the new efficiencies in accounts payable processing save HDS more than five hours every month.

INTEGRATION SPEEDS RECONCILIATIONS

Sage Intacct also helps speed and simplify the reconciling of bank transactions and processing premium refunds.

The company receives bank files with this information and uses the import templates in Sage Intacct to bring the data into the application, saving time and improving overall accuracy.

BUDGETING SIMPLIFIED

More recently, the company added an additional tool, Sage Intacct Planning, with the assistance of Net at Work. This web-based budgeting and planning application is simple to use, quick to implement, and integrates tightly with Sage Intacct. It covers the entire budgeting and planning lifecycle and optimizes the dependency that businesses like HDS have on spreadsheets in the budgeting process.

"Our directors love it," says Numasaki. "They all prefer creating their budgets in Excel. With Sage Intacct Planning, we can easily import those files into the application. We then transfer actuals from Sage Intacct to allow for comparisons and forecasts. It requires much less work and provides our stakeholders with current information they can use for planning. It allows them to 'own' their budgets in a way they couldn't previously."

AUTOMATED REPORTING SAVES 12 HOURS EVERY MONTH

HDS is also realizing tremendous time savings surrounding its financial reporting tasks. Previously, staff would need to generate individual reports from each Sage 300 company, export the reports to Excel, and spend time formatting the financial statements. "Any time there was a change to a transaction, all the input sheets and reports needed to be refreshed," recalls Shigeta. "Now, we get the reports we need directly from Sage Intacct and changes are updated in real time."

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“We estimate that across all our staff time, we’re saving 17-plus hours every month.”

The company’s multi-company accounting structure used to mean that the accounting staff wasted time logging out of one company in Sage 300 and into another. With Sage Intacct, they can easily access each of the different companies from a single drop-down menu. And reporting and check printing tasks across entities are as simple as selecting the entities to include.

“We estimate that across all our staff time, we’re saving an additional 12 hours every month,” says Numasaki. “It’s time we can spend analyzing the data, spotting trends, and looking for cost saving opportunities — tasks that add real value to the organization.”

Hawaii Dental Service looks at its move to Sage Intacct with the help of Net at Work as a fortunate one, even if it wasn’t originally initiated by the accounting team. “We weren’t seeking out a new system, but now that it’s here, we couldn’t go back,” concludes Numasaki with a smile.

ABOUT NET AT WORK

Founded in 1996, Net at Work is the largest implementer and supporter of Next-Generation ERP solutions for small- and mid-sized businesses throughout North America. Along with CRM, HCM, and managed services, Net at Work offers a rich portfolio of technology, expertise, and services to help companies derive value from the transformative effects of technology.

To begin unleashing the power of your business, visit www.NetatWork.com.

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