

Team Select Home Health Secures Platform and Partner to Sustain Long-Term Growth

Industry	Client Since	Solution
Healthcare	2018	Sage Intacct

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Ryan Press
Accounting Manager
Team Select Home Care



Team Select Home Care is one of the nation’s top-performing home health agencies. The organization consistently receives industry accolades for the quality of its services and workplace culture. Team Select has grown quickly – organically and through acquisitions – and now has more than 6,000 employees and is licensed to operate in a dozen states.

QuickBooks Can’t Keep Up

For years, the organization made do with QuickBooks as its accounting application. However, as Team Select grew and its operations became increasingly complex, QuickBooks simply couldn’t keep up. “It’s fine for small companies,” says Ryan Press, Team Select’s Accounting Manager, “but we’re no longer a small company. We need financial tools that can scale with us as we grow and change.”

When Ryan joined Team Select, the organization had recently transitioned from QuickBooks to Sage Intacct. “When I see how well Sage Intacct works for us, I cannot even imagine trying to do this with QuickBooks,” notes Ryan. “Sage Intacct is ideal healthcare accounting software for growth-minded companies like ours.”

Multiple Business Units Increase Complexity

Part of the organizational complexity involves Team Select’s need to track costs and revenue associated with multiple business units. Sage Intacct simplifies the complexity with dimensions.

“We use dimensions to tag transactions by business unit, location, department, and employee number,” explains Ryan. “This allows us to get very granular with our reporting. As a result, we clearly understand which areas of the business are doing well and which may need attention.”

Dashboards Deliver Real-Time Decision-Making Data

BT Partners configured role-based dashboards for Team Select’s various users. The dashboards display the daily and monthly metrics users need to perform their jobs. Ryan’s dashboard, for example, shows revenues and margin, a graph depicting administrative costs over a rolling six-month period, marketing and overhead expenses as a percentage of revenue, and budget data.



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“It’s my go-to spot for an instant, up-to-date view of how we’re doing,” says Ryan. “By monitoring this data, we’re better able to spot trends, identify opportunities, or catch potential missteps.”

Visibility Supports Human Resource Optimization

The vast majority of Team Select’s workforce consists of its caregivers – thousands of individuals who work tirelessly to provide compassionate care in individuals’ homes. The caregivers range from home health aides to registered nurses to physicians.

Unsurprisingly, payroll is the company’s single largest expense. To maximize the productivity of each of its caregivers, Team Select tracks and analyzes various healthcare accounting metrics, including the number of visits and home health admissions.

“Most people are aware that there’s a nursing shortage in the U.S.,” Ryan explains. “That puts nurses in high demand, meaning we must successfully manage wage pressure to attract and retain quality caregivers. The custom reports BT Partners configured for us provide the detailed cost and productivity information we need to make strategic compensation decisions so we can attract and retain the best.”

Similarly, in geographic areas where costs may be especially high, Team Select can use this data to petition insurance providers for rate increases. “Access to this kind of data also helps us choose the best locations to expand our footprint,” notes Ryan.

Team Select uses one of the dimension fields in Sage Intacct to hold the skill level (such as RN, LNP, or MD), which allows the management team to analyze costs and productivity rates by the practitioner. “We use that information to maximize our caregivers’ skill sets and optimize their productivity,” says Ryan.

Integration Extends Capabilities Seamlessly

Employee and payroll data is collected and managed in medical record software, which also handles the complex Medicare billing tasks. Using the Sage Intacct API, BT Partners could schedule an import of the medical record software’s data into Sage Intacct, providing the payroll cost and summarized billing data. Similarly, a revenue cycle management service sends patient invoices and processes payments. “We then bring that data in Sage Intacct,” notes Ryan.

In a true best-of-breed healthcare accounting approach, Team Select also leverages Sage Intacct Marketplace solutions, including Bill.com to further automate payable workflow, ADP for payroll processing, and Adaptive Insights for budgeting and planning. “Sage Intacct is at the center. It’s the platform we build on,” notes Ryan.

“BT Partners is a great resource for Team Select. We go to them for any questions about how to get something done within Sage Intacct, and they always have quick, insightful answers. It’s clear that they have experience working with companies in the healthcare sector – they understand how we operate and always take best practice approaches to solve our challenges.”