



Case Study

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~CenCal Health

The Customer

Since 1983, CenCal Health has been providing high quality health care to low-income central-coast Californians. As the oldest publicly funded Medicaid managed care program of its kind in the country, CenCal Health works with over 1,500 physicians, hospitals, and other providers to bring coverage to 1 in 4 people in Santa Barbara County and 1 in 5 in San Luis Obispo County.

Amy Sim, General Accounting Manager, has been responsible for CenCal Health's G&A budget for nearly two decades. Amy says that state funding is the main driver of her budget. *"Each budgeting cycle, we first have to figure out what the state is going to give us. Based on our total revenue, we are allowed a small percentage for administrative costs. We use a decentralized, bottom-up approach, asking our department heads to compare to the previous year and then create their expense budgets off that."*

The Problem

Initially hired as a financial analyst, Amy was quickly promoted to Senior Financial Analyst and then to Accounting Manager. Amy recalls that a year after she was hired, the

CFO handed her the administrative budget and told her it was her turn. *"The budget was a time-consuming paper and Excel process that took many hours. Initially we only had 99 employees, but strong organizational growth has increased that number to 300, causing the process to take more and more time."*

Consolidating 17 departments' budgets manually in Excel was a painstaking task fraught with human error. *"We had to make certain our numbers stood in line under the state's figures. Everyone had their own worksheets, and I would get them back—often at the last minute—and have to put them into the master worksheet. There was a real risk for error. Sometimes budget managers would change my formulas, and if I didn't catch it, their budgets would be inaccurate, so I had to make sure I protected every sheet. I had a different worksheet with a million tabs for every single department, and if anything changed during our budget meetings, I had to make sure that I updated all of the spreadsheets. It was very easy to miss something."*

Amy asked for funding to improve the budgeting process, *"I needed software. I needed something to help."*

The Evaluation

In 2016, much to Amy's relief, she received approval to purchase budgeting software and began the search for a solution that would save time, reduce errors—and hopefully make her life a little easier. *"I'm all about new software. I researched several options, specifically thinking about who was going to be using it and what they would need to see. The budget managers are not necessarily financial people. So, I wanted something that would be simple for them."*

Amy noticed that most of the budget software products were Excel look-alikes. *"I didn't want to give my budget managers another version of a spreadsheet. Even if they wouldn't be able to change my formulas or mess up links, they'd still be in something that looked like Excel, and I wanted to get away from that."*

One product called **BudgetPak, a cloud-based budgeting, forecasting, and reporting solution from XLerant**, stood

out from the rest because it looked nothing like a spreadsheet. *"I saw BudgetPak and I thought, 'That looks cool.' It was so simple. You'd just click in the box, and it would let you know what to do next and where you were in the process. A lot of the other products were just too complicated. And if it was complicated for me, it was going to be extremely complicated for the directors. I was the one who would ultimately have to be there to help them along with the process after initial training. BudgetPak looked like a program they would remember how to use from year to year."*

Amy included her end users in the evaluation of BudgetPak. She had worked with many of them for years and understood what they *didn't* like about Excel, and she wanted to be sure they liked the way the new system would work. *"They really liked BudgetPak's visuals and the click-the-box method. They liked that it didn't look like a spreadsheet. They were excited to try it out!"*

The Solution

CenCal Health has been using BudgetPak for 3 years now, and, according to Amy, it has dramatically increased the **efficiency** of their budget process. *"I was hopeful it would save time, and it has saved more than I realized...about **35%**! Especially after every budget meeting, coming back with all the changes and having to update everything...now when I make updates, BudgetPak takes care of everything for me, making sure it's all totaled up. It saves a lot on human error."*

Working with XLerant has been a positive experience for Amy and her team. *"Implementation, installation, administrator training, user training—the whole process went smoothly. It was all very step-by-step, and the deadlines were reasonable. There was a bit of a learning curve on the administration side, but after going through the training it has been very easy to use—I really like the 'wizard' feature that walks me through it. And **customer support** has been great. I've never had a time where I'm waiting around for an answer."*

Amy is pleased with BudgetPak's high level of **user engagement**. *"With Excel, I had a really hard time getting the budgets back from the directors. I'd have to say, 'Okay. They're due on this date.' And then, 'I need them back, guys.' And a week later, 'I really need them back!' Now everyone is very prompt because BudgetPak's interface is so easy to understand, and because it's a **cloud-based** system they can do it whenever they want, even from home. BudgetPak has such excellent **ease of use** that my budget managers continue to comment on how much they enjoy it. I like that it has different levels, so if people want to get a bit more sophisticated, they can. But if they don't want to, they don't have to."*

Amy has also noticed improved **communication** around the budget. *"BudgetPak gives our users an easy way to include notes and justification for their numbers, so when we have executive meetings, I can quickly pull a report and have all the answers right in front of us...what they're budgeting for, why they're budgeting for it, if it's higher or lower than last year. When there are changes after a budget meeting, I can*

immediately go into BudgetPak, update at the account level, and include a note explaining the changes to the user. Communication is so much better."

Another benefit is how CenCal Health's budget managers are taking on more **ownership and accountability**. *"Everyone is able to look at information on their own, and they are able to run their own reports, which saves me a lot of time. They can log in and see all of their costs throughout the year. It has caused them to think more about what they actually budget versus just going through the motions. Instead of simply using the same vendor year after year, they are able to easily see if the vendor's price is increasing and make an informed decision."*

With BudgetPak's **built-in controls for the finance team**, Amy is seeing a whole new level of accuracy and feels confident in her budget process. *"Being able to easily lock the system once the budget is finalized has been huge. Directors can still get in there and run reports throughout the year, but they can't accidentally make changes. BudgetPak gives us a better-quality budget. Now we can **trust the numbers**."*

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