

New York State Office for People with Developmental Disabilities

www.opwdd.ny.gov

COMPANY

- Location: HQ in Albany, New York, plus 12 locations around state
- Industry: State agency serving 128,000+ individuals with developmental disabilities; responsible for accounting and auditing of each client's finances

OVERVIEW

After 30 years of hand-processing financial transactions for thousands of state residents, OPWDD implemented Acumatica in 2015, improving the connection and transparency between offices and strengthening the accountability and security of financial data.

SOLUTION

- Acumatica Financial Management
- Acumatica Distribution Management
- Acumatica Project Accounting

KEY RESULTS

- Improved accountability and responsiveness through integrated, web-based system
- Time savings of weeks—in some cases, months—in managing client financial transactions
- Multi-level security ensures clients' finances remain safe

Acumatica saves large state agency "weeks" of time with integrated system

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- Wayne Wylie, Senior Business Analyst
New York State Office of Information Technology Services

SITUATION

The New York State Office for People with Developmental Disabilities (OPWDD) assists more than 128,000 individuals, acting as their fiduciary agent, or guardian, in managing their finances. About 2,000 people handle these financial management tasks, in more than a dozen locations around the state.

For 30 years the agency relied on a state-created system called "Client Cash," which required OPWDD staff to spend a large amount of time tracking and coordinating each client's income and expenses on an outdated stand-alone character based PC. In addition, the OPWDD business office used software that didn't communicate with the different systems used by the resident care providers or by the state's facilities.

To help find a solution to OPWDD's challenges, New York State's Information Technology Services (ITS) brought in two consultants, Senior Business Analysts Wayne Wylie and Len Baglia. A key problem, the consultants found, centered on the lack of connection between the offices and facilities. "It was a single entity system that had to communicate with 15 sites across the state." Unfortunately, with the old system, Wylie says, "There was no communication between the sites."

Before he arrived, Wylie reports that the state had tried for 20 years to find a better financial management system for OPWDD, but they couldn't find a solution that could integrate "at least four of the functions required for the overall working process." He adds, "They were trying to replace one system; it actually was a fractured system that required two or three other components to complete the individuals' financial history."

In addition, Wylie says, the agency wanted to upgrade security for their clients' finances. "It was time to look into other options," Wylie says, "because you're talking about millions of dollars that come in a month for these folks."

The security concerns made the state want to house any new solution on their own server, says Patricia Bennett, of Acumatica Gold Certified partner PC Bennett. "They wanted it on-premises because of the nature of the data," she says. "They wanted maximum control of security for the data."



Wylie adds, “That’s where Acumatica came into the picture, with its multi-level security platform.”

SOLUTION

Wylie and Baglia researched several “off-the-shelf” ERP options, including Intuit, NetSuite, SAGE, AccuFund, Intacct and Microsoft GP and Nav. “We looked at a number of companies, and Acumatica came out on top,” he says. “When we needed to get to user requirements—as far as individual ledgers, banking modules, check-writing, multi-level screen and role security, multi-level reporting—other proposals fell apart, or the price started to skyrocket.”

The Acumatica licensing model, allowing unlimited users, also impressed them. Wylie reports, “That was the anchor we used to pitch the system to stakeholders and the system owner. We weren’t going to start with 2,000 people, we would build up to that point. The way Acumatica is set up, you can add on. They gave us a number of options; other places didn’t have those options.”

Wylie and Baglia also appreciated being able to demonstrate to the stakeholders how the new system could work: “That’s one thing that really sold us, because Acumatica allowed us to test-drive it, and they answered questions. They helped us to build what we knew that we needed to sell it to the stakeholders.”

The State decided to purchase Acumatica with the Financial, Project Accounting, and Distribution suites, on a perpetual license. Because it’s located on-premises at their server farm, Wylie reports, “The state didn’t have to invest any more money in hardware.”

OPWDD launched Acumatica in February 2015 and has implemented the new system in about a third of their locations. He appreciates that users can have access to their Acumatica system from anywhere. Says Wylie, “It’s web-based, that’s what makes it unique.”

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BENEFITS

Acumatica’s connectivity has given OPWDD staff huge time-savings, Wylie reports:

“I would say it saves literally days and weeks.” The biggest complaint about the old system centered on time involved in processing payments, he says, adding, “The old system was mostly manual, a lot of paperwork and forms.” Processing a purchase order would “sometimes take a week to two weeks,” he says, “but if there was something wrong with the paperwork, it would have to come back and go through the process all over again.”

Now, Wylie says, “Acumatica has made it so we can do it immediately. They send an email through the system ... they’re up and running within half an hour or so. And the State can track the transactions, inventory and audit in real time.”

Acumatica’s integration of previously disjointed systems has also dramatically reduced the time involved in managing clients’ finances and their personal property inventory when they move. Wylie reports, “Acumatica will encumber the amount of money to pay bills, and send the

rest of it, along with the whole inventory, to its new location that same day.” In the past, Wylie says, that process “would have taken about two months.”

The ability to customize Acumatica has also benefited the OPWDD users. Wylie says, “We were able to make it almost look like what they used every day for 30 years.” Partner Patricia Bennett agrees, noting they were able to use Acumatica’s tools and infrastructure to build “the perfect solution” for OPWDD, “because we customized the software to serve their needs.”

Wylie and Baglia praise the support they have received from both Acumatica and partner PC Bennett. Wylie says: “We feel very good. It’s catapulted us to a place where now we can do everything we need to do.” He adds, “Acumatica was very attentive to our needs. They’re very good, and I believe this is only a small part of the state (government) that can use this system.”