



Dramatic Reduction in Administrative Effort Achieved by Integrating EZ-CARE2 with QuickBooks®

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Heather Brescol
Executive Director
KingsCare

SUCCESS STORY

KingsCare School-Age Program

Customer Profile

For over 23 years, KingCare has provided school-age childcare enrichment programs for King Elementary School K-5 students. They have a staff of 12 supporting 110 enrolled children, and provide parents flexible scheduling options including full day care for teacher in-service days.

Business Challenge

KingCare was trying to use QuickBooks for managing all aspects of their school-age program accounting and administration. While QuickBooks provided a good solution for budgeting and financial management, they were struggling to use it effectively to handle the unique requirements of childcare and school-age programs in terms of enrollment, scheduling and billing. According to Heather Brescol, executive director of KingCare, "Our record keeping for critical information like emergency contacts, immunization and health data wasn't stored in a database, and our process for posting charges and creating invoices was time consuming and prone to error. We created attendance sheets and information reports such as student contact information, health concerns, allergies, etc. in Microsoft Word. There was also lots of double work such as recreating accounts for returning families every time they re-registered for our program."

Solution

KingCare selected SofterWare's EZ-CARE2 Management Software, which offered a module called EZ2-Post that integrates with QuickBooks. All family & child enrollment data, child schedules & attendance, and fee & payment management is done using EZ-CARE2. Then, the account data and detailed fee & payment transaction activity is transferred to QuickBooks via a simple automated posting process. This allows them to use QuickBooks for budgeting, expense management, financial reporting and tracking non-childcare related revenue.

Key Results

Daily Administration

"Going to EZ-CARE2 for all our childcare administration, while using QuickBooks for accounting and budgeting was exactly what we needed to best manage our program. I cannot say enough how much time and payroll EZ-CARE2 has saved us!" noted Heather. "It's very user-friendly and all the data is easily accessible. The biggest benefit to us has been the time-savings. For instance, once a family record is entered, we never have to retype it. If they re-register for another year, we simply copy the data with one click. We also set up all our tuition rates in EZ-CARE2, which allows us to post the appropriate fees to all the children at once. This is much less work than the steps we

AT A GLANCE:

Customer:

KingsCare School-Age Program
Ann Arbor, MI

Business Challenge:

Improve school's system for managing enrollment, scheduling and billing in a way that effectively integrated with QuickBooks for budgeting & financial accounting.

Solution:

EZ-CARE2 center management software including SofterWare's EZ2-Post accounting interface to Quickbooks.

Results:

- Reduce administration time by over 25%
- Improve fee calculation process, invoicing, and payment processing while eliminating data double entry.
- Simplified bank reconciliation and dramatically reduced discrepancies to almost zero.





had to perform each month before. EZ-CARE2 has also simplified the process of creating reports. In the past, we would create a report and, if something changed, we'd then have to go in and manually change all reports. EZ-CARE2 has made this process all but disappear.

Also, before EZ-CARE2, we printed invoices from QuickBooks and then either mailed them or handed them out to families as they came to pick up their children. A big problem with these methods is that they were costly and it didn't ensure that all parents received their bills in a timely manner. Now, with a few clicks, we create a whole batch of invoices, and we can email them instead of mailing. This saves a huge amount of staff time, and also saves the cost of ink, paper and postage! In addition, emailing the invoices gets them out much more quickly, which also allows parents to email back questions or concerns. We can then fix any errors in a timelier manner and immediately resend a corrected invoice."

QuickBooks Integration

The integration between EZ-CARE2 and QuickBooks has greatly improved KingCare's operations. "We use EZ-CARE2 now for all our scheduling, tuition management, and daily childcare administration, and the relevant data is also available and updated in QuickBooks for our financials. Once the interface between EZ-CARE2 and QuickBooks was setup, there was absolutely no double data entry."

The integration has also simplified KingCare's process of reconciling their deposits. "Before, it was hard to reconcile and we spent a lot of time fixing errors. Now, the deposit information comes into QuickBooks. EZ-CARE2 allows us to double-check the values and amount of deposits, and compare that with QuickBooks. As a result, we have almost no corrections to make. This not only saves time, but gives us confidence that our data is accurate for decision making," noted Heather.

"Overall, we've been able to cut down the amount of payroll hours devoted to administration by at least 25%, and put that valuable time into other areas that have improved our program."

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www.softerware.com/ezcare2

QuickBooks
www.quickbooks.com

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