



CUSTOMER SUCCESS STORY

Making the Connection

Integrating Sage Abra HRMS & Sage MIP Fund Accounting

CUSTOMER

PathStone
www.PathStone.org

INDUSTRY

Nonprofit

HEADQUARTERS

Rochester, NY

OTHER INFO

500 Full- and Part-Time Employees
70 Locations Across 7 States

SYSTEM

Sage Abra HRMS
Integration with Sage MIP Fund Accounting

When you're a not-for-profit organization that relies on federal, state, faith-based and private funding, you'd better have a clear path to great record-keeping. And with nearly 500 full- and part-time employees, PathStone has its journey mapped out. But Lisa Zhu, PathStone's Senior Vice President of Human Resources (HR), faced one huge hurdle on the way: payroll and HR databases that didn't communicate with each other.

Lisa says, "This was a big problem because we regularly see a good volume of employees hired or rehired for seasonal purposes. Manually entering new employee data twice into both our HR and payroll systems had become an administrative nightmare."

Seeing Double

Spanning seven states and 70 office locations, PathStone provides community development and human services that make life better for farm workers, low-income families, and economically depressed communities. According to Lisa, "We're a service-based organization and it's our people that make us successful."

To manage their human resources, PathStone previously used a home-grown, Microsoft® Access® database along with Sage MIP Fund Accounting for payroll processing. However the two applications weren't integrated.



Lisa recalls, "Information on new hires was entered into payroll first; then, we entered the same data into our HR software. In fact, we were spending up to 10 hours every week manually entering duplicate data." To make matters worse, updates in payroll weren't always picked up in HR and vice versa. Lisa states, "After a while, discrepancies in the two systems made it difficult to prepare accurate budgets and a lot of time was wasted reconciling data."

Enter Cost Management Services

Prior to joining PathStone, Lisa had experience using Sage Abra HRMS - an affordable HR software system for HR administration, benefits management, compliance, recruiting, attendance and more. She approached her Sage MIP Fund Accounting provider, JMT Consulting, who then brought in the HR software and employee management specialists at Cost Management Services (CMS).

According to Brian Kelly at CMS, "We worked closely with JMT Consulting to offer complementary services & strengths."



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Lisa Zhu

Senior VP of HR
PathStone

CMS subsequently implemented Sage Abra HRMS along with a bi-directional integration with Sage MIP payroll that turned out to be critical in PathStone’s successful transformation.

Making the Connection

Today, Sage Abra HRMS has helped PathStone simplify everything from new hire processing to ongoing administration. Lisa states, “We were spending a couple of hours each day on HR and payroll issues - either entering and reconciling data or looking up information. But with Sage Abra, we’ve streamlined our entire new hire process workflow and slashed data entry time in half.” Information entered in Sage MIP Payroll is now moved easily to Sage Abra HR with the click of a button. Plus, the data stays synchronized when changes are made in either system.

Simple Compliance & Solid Funding

One special consideration for PathStone, as with any non-profit agency, is that of regulation and compliance related to grant and government funding. Lisa says, “To demonstrate compliance with various agencies, we often get requests for detailed information about employees in each of our 14 lines of business. Before, it was nearly impossible to pull this informa-

tion together and we were at risk of losing grant funds if we couldn’t provide accurate reports.” She adds, “But with Sage Abra, we can run worker’s comp reports, track employee promotions or terminations, easily collect data on EEO and OSHA requirements, and present the information in mandated formats ... things we couldn’t do before or that took hours to do manually.”

Flexibility is Key

Another important feature was the ability to customize Sage Abra to meet specific needs. According to Lisa, “Some of our staff is required to maintain state certifications, are entitled to tuition reimbursement, or require special training courses. We use Sage Abra custom fields to track certifications, dates of completion, and reimbursement amounts.” Plus, CMS designed several custom screens to effectively track and report on information for state audit purposes.

In closing, Lisa says “The staff at CMS has been wonderful to work with. They’re extremely knowledgeable when it comes to HR compliance issues. But perhaps most important, they did a thorough analysis of our processes and reporting needs before implementing an integrated HR system that turned out to be a fantastic solution.”



Cost Management Services (CMS)

Cost Management Services, a Sage Select Certified Business Partner, is your resource for the full line of Sage Abra HRMS, Payroll, Timekeeping, and Recruiting Management systems. In business since 1997 and serving businesses throughout New England, CMS’ knowledge and experience extends over 25 years to provide our customers with the greatest available resource in HR and Payroll management software, with a specialty in automating Non-Profit organizations. Visit our website at www.cmshris.com.

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