



INDUSTRY CASE STUDY

HEALTHCARE





THE Challenge

A group of facilities specializing in elder care, medical care, and rehabilitation needed a faster, more reliable way to access accurate financial and operational data.

To track costs, monitor capacity, and reconcile billing, financial analysts and managers required transaction data. They had to manually pull data when the previous automation failed, which slowed reports and decreased facility visibility.

They needed a dependable, secure way to collect and process financial data automatically—without compromising ongoing operations or disclosing personally identifiable information (PII).

OUR Solution

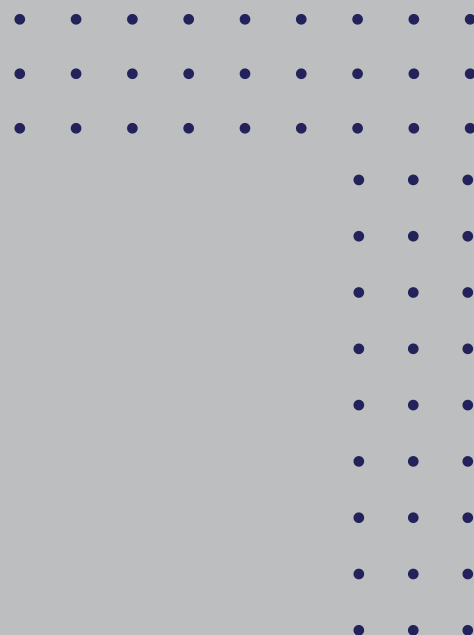
As their **Managed Intelligence Provider (MIP)**, Simpatico rebuilt and enhanced the client's automation process to securely extract and sync transaction data across systems.

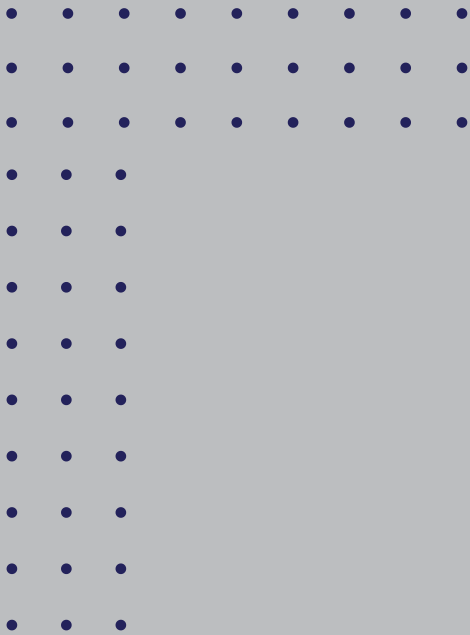
DISCOVERY & DESIGN

By identifying gaps in monitoring and data transfer, Simpatico evaluated the prior automation failures and redesigned the workflow for consistency and security.

AUTOMATON & INTEGRATION

- Built a secure script to pull PII-safe transaction logs from the vendor's SQL database.
- To ensure continuous up-to-date data access, we set up hourly uploads via SFTP.
- If a transfer or restoration fails, there is now added automated monitoring to create support tickets.





THE Result

The new automation removed the need for manual data gathering and reestablished continuous reporting across all facilities, ensuring timely, accurate financial insight for analysts and management.

KEY OUTCOMES

- Accurate, hourly transaction data feeds for financial analysis.
- No data interruptions are guaranteed via proactive monitoring.
- Real-time reconciliation and improved forecasting.
- Reporting was made easier for analysts and facility management.

SAVINGS & ROI

- Annual Savings: Significant time savings through faster financial reporting and reduced manual work.
- ROI: Achieved within months through efficiency gains and error reduction.

PARTNERED Success

As their **Managed Intelligence Provider (MIP)**, we changed their business model rather than just putting a tool in place. We transformed a disjointed service model into an intelligent, cohesive platform by bringing people, process, and technology into alignment.



Strategic Design



Identified and corrected major gaps in the previous workflow, rebuilding the automation framework for reliability, accuracy, and security across all data touchpoints.

Automation & Scale



Implemented secure, hourly data transfers designed to handle growing transaction volumes and scale seamlessly across multiple facilities.

Monitoring & Support



Introduced intelligent alerting and auto-ticket creation to ensure uninterrupted data flow, allowing issues to be detected and resolved before they impact reporting.

Ongoing Partnership



Provide continuous oversight, performance tuning, and proactive improvements to maintain long-term system stability and support evolving business needs.



THE Conclusion

This case study illustrates how Simpatico's **Managed Intelligence Provider (MIP)** model delivers efficiency, reliability, and insight through intelligent automation.

Through the restoration and improvement of the transaction log procedure, Simpatico enabled financial teams to:

- Access accurate data in real time.
- Reconcile billing and expenses instantly.
- Save valuable time once lost to manual data gathering.

With Simpatico as their MIP partner, the organization now operates with greater accuracy, speed, and visibility—turning data automation into a foundation for smarter financial management.



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