Hackensack Meridian Health's
Seamless Transition to Axiom Budgeting in the Cloud

Hackensack Meridian Health

2,000 users, 500+ facilities, zero complaints

At the height of budgeting season, nearly 2,000 of Hackensack Meridian Health's 35,000 employees — including owners, reviewers, approvers, and others — touch centralized budget documents in some way.

Having so many people involved might sound like a recipe for disaster. But since the health system uses Strata's cloud–based Axiom™ Budgeting software, each user can access a common version of budget documents from anywhere and make changes as needed, based on security permissions.

When the health system consolidated budgeting functions across facilities and moved into the cloud, budget department staff wanted to minimize the learning curve and deliver a consistent, seamless experience for users. So how did the transition go?

"That's the joy of it. Users didn't even know we moved to the cloud," said Steve Esposito, Network Director of Budgets at Hackensack Meridian Health. "We know what's happening in the back end and the benefits of the cloud, but nothing changed for my end users. I wanted a nurse manager, for example, to open up the software tomorrow and have it be the same. There was no change except moving from a desktop icon that launched Axiom Budgeting to a web address that users could bookmark for easy reference."

Budgeting provides single source of truth

Hackensack Meridian Health's fiscal year begins on January 1, so the budgeting team generally begins the budget process in September for presentation to the board in early December. Esposito described budgeting requirements as "very

2K

2,000 users,
1 seamless transition

Almost zero budget
season overtime

Less than 3 months
to implement

ORGANIZATION PROFILE

- 14 hospitals
- 500+ ambulatory, home health, rehabilitation, skilled nursing, and fitness/wellness centers
- Largest health system in New Jersey
- 35,000+ employees

detailed" down to the employee or patient level, plus a summary shared with executives. Axiom Budgeting is the workhorse behind the numbers, pulling in data from general ledger, HR staffing, accounts payable, and payroll systems, as well as a data warehouse.

"Using Axiom, we can pull information in and out to our source systems very easily," Esposito said. "To deliver accurate numbers and the right details, you need the software to do the heavy lifting for you, and Axiom does it seamlessly. We've never had an issue."

The budget process takes about three months, a timeline that has grown and shrunk over the past few years as the organization underwent mergers.

"Every time we got good at budgeting, there'd be another merger, and then we'd have to fold in a new area, go through new processes, and spend more time," Esposito recalled. "So we shrink it, we grow it, we shrink it. It's been like a Slinky for the past six years. But that's the joy of Axiom Budgeting, it's flexible. It does that for us."

Given the vast organizational changes at Hackensack Meridian Health, efficiency gains can be difficult to ascertain. The department budgets for 14 hospitals and more than 500 ancillary facilities with a staff of nine. Esposito uses the amount of working weekends and overtime as a rough measure of efficiency — fewer weekends and less overtime mean budgeting is more efficient. Since the previous merger, his staff hasn't logged much overtime and has the weekends mainly free for personal pursuits.

Each June, Esposito's team begins prepping and testing tables for the upcoming budget. "We test every year because we always have some type of change," he said. "We do a lot of testing across our different templates. It's always successful, we don't have problems, and we don't have to worry about fixes and stuff like that."

Agile, user–friendly tool handles different budget types and reporting

Although part of the same health system, nursing homes, for example, focus on different budgeting aspects than hospitals. Esposito and his team developed a series of templates within Axiom Budgeting to accommodate different needs. The standard template covers hospitals, corporate, and what he calls "run–of–the–mill" departments. Non–standard templates cover long–term care facilities, nursing homes, home care, realty, and physician divisions.

"Until about 18 months ago, our department didn't do budgets for other divisions because they weren't on the cloud," Esposito said. "Once everybody came on the cloud and we harmonized the budget process, we pulled key members from other departments and centralized budgeting to one department."

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> *Network Director, Budgets at Hackensack Meridian Health*

Despite having nearly 2,000 Axiom Budgeting users, Hackensack Meridian Health performs its own training, a testament to the usability of the software. Site controllers in each hospital and each division provide Axiom training for any new employees who use the software daily. The vast majority of users touch the budget only during budget approval season. For them, the budget team has compiled a step–by–step instruction manual.

"We try to make it dummy–proof, taking users tab by tab, line by line," Esposito said. "The more we can teach somebody else, the fewer questions we get. My team members have become experts in the software. Now, with nine people, we have a longer reach to help users. We teach them to be experts in the software."

Seamless move to the cloud

During conversations about how best to standardize and harmonize the network onto the budgeting platform after the merger of Meridian Health and Hackensack University Medical Center, an Axiom representative suggested moving to the cloud.

"There are obviously benefits to going to the cloud because we don't have to worry about maintenance, IT, or servers," Esposito said. "Our instance of Axiom Budgeting is hosted with the experts that run the software. It makes sense. It was a good opportunity, a good time for us to make that change and bring everybody onto the platform, so we ran with it."

The network director naturally had concerns about speed and performance of any cloud–based budgeting software, so Esposito did his homework. During an Axiom networking event, Esposito closely questioned customers from healthcare and other industries that Strata serves about their experiences. He came away satisfied that cloud was the way to go.

Esposito received approval for the move less than three months before the start of budget season. "Despite the tight timeline, it was really a seamless transition," he said. "Nobody noticed, not even our users. That's the way I wanted it."

Previously, software upgrades would take a day or more and require everyone to be locked out of the system. Now, upgrades are scheduled in advance during a slack usage period, and the software is available again quickly.

He especially appreciates the support he receives from Strata. "When we need support, we just call and they deal with it, instead of going into our internal IT's queue, as we did on the old software," Esposito said. "If it wasn't budget season, our IT couldn't prioritize us. Strata always takes care of things right away.

"Software is software, and costs are costs, but if you can work well with people and build good relationships with them, that goes a long way. That's what I've had with Axiom over its entire life — great software and great relationships with great people."

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