



## The right tools to help your people do their job

### Overview

**Columbia Industries** (CI), located in Kennewick, Washington, is a non-profit 501(c)(3) agency providing vocational training and employment opportunities for people with disabilities. Training for individuals is provided through a diverse number of business divisions that include, retail, production, assembly and janitorial services to the community and federal agencies. Assessment and employment opportunities for individuals are also provided through CI's placement division. CI's vocational training is provided to approximately 74 people with an additional 68 people receiving employment services yearly.



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### About Vertex Systems

Vertex delivers effective and efficient software solutions superior support services that help unlock the potential of human services organizations and maximize their ability to make a difference. Our vision is to be the premier and preferred provider of information management products and services to social services agencies that serve those with disabilities.

*“Vertex Systems’ support staff is very helpful, knowledgeable, and nearly immediately available!”*

**Kay Hamilton**, Director of Program Operations

### Situation

**The Mission of CI:** Columbia Industries helps people with disabilities and other barriers to employment achieve their highest employment potential. This allows them to achieve self-sufficiency and contribute to the productivity of our community.

At the beginning of FYE 2011, Columbia Industries created, and commenced operations of, CI Support, LLC (CIS). CIS is a wholly-owned, for-profit LLC, taxed as a corporation. The LLC employs all support staff, student and temporary staff to perform administrative and support functions for CI under contract. The total number of support staff employed by the LLC is 60. Additionally, approximately 40 student staff members are employed year-round, and that number balloons to over 150 during the summer months.

Columbia Industries needed to manage their commensurate payroll for their clients with disabilities within their business divisions. “We needed software to allow us to track and pay our subminimum wage trainees appropriately,” said Rich Foeppe, President and CEO of Columbia Industries. They were in need of a new accounting package that would bring together their disparate systems and help manage their financial, human resources, payroll, invoicing and reporting requirements.

### Solution

Columbia Industries contacted Vertex Systems to solve their participant payroll and accounting issues. After the implementation and training period, they realized quickly they had the tools they needed to do their jobs. “We use Client Payroll Manager for the highly nuanced payroll calculations for the approximately 75 clients that we serve. Most of our clients have disabilities that restrain them from accomplishing their work routines as timely as non-disabled individuals. Accordingly, we do frequently do time-studies on them to assess the percentage of effectiveness of task completion as compared to non-disabled individuals,” said Kay Hamilton, the Director of Program Operations. “Their pay rate, which is typically a subminimum wage, is based on that percentage, which Client Payroll Manager tracks.”

With Client Payroll Manager, their commensurate wage pay calculations easily integrate into their new accounting system, the Vertex Financial Manager. This powerful solution, based on Microsoft's Dynamics NAV, forms the basis of their accounting system. This enterprise resource planning software package provides the fundamental general ledger application and handles their accounts receivables (sales), accounts payable (purchases), human resources and payroll requirements. At first, the comprehensive program required additional training

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**Kay Hamilton, Director of Program Operations for Columbia Industries**

and support for the agency due to the capabilities of Vertex Financial Manager. “There was a learning curve but we have rarely asked it to do something it can’t handle and we are enamored by its capabilities,” said Hamilton. She also noted that they’ve been especially pleased by the support services offered by Vertex, adding that the people she has worked with are “very helpful, knowledgeable, and nearly immediately available, by the way!”

They are happy with the results Vertex Systems has provided them. “The accounting team uses Vertex Financial Manager as its general ledger to keep track of two companies and several departments within the two companies,” added Hamilton. “It is also used to allocate administration expenses between departments. Financial Manager is also used for all payroll functions, including direct deposit.” The application calculates the taxes withheld, if any, and the amount of employer tax liability, if any, and either prints the pay check for each client, or by integration with the NACHA system of their bank, electronically deposits the payroll funds in the client’s personal account.

## Benefits

Vertex Systems has provided Columbia Industries with more than just accounting and client payroll software. They have given CI quantifiable benefits, including:

- **Time & Cost Savings.** “The implementation of the direct deposit function within Financial Manager payroll has sped up payroll processing for three payrolls. It has also saved costs by reducing the use of checks with stubs by only having to print remittance advices for those having direct deposit (the bulk of employees).”

- **Quality Reporting.** Their accounting department has also grown to depend on the potent reporting module within their system. They use Jet Reports to easily create management reports for the leadership team and for Board reports. “Jet Reports has enabled the CFO to prepare reports to the leadership team and the Board on a consolidated basis for the combined two companies on a timely manner. Jet Reports also allows the CFO to make an allocation of intercompany expenses easier and timelier,” said Hamilton. “Reports from Client Payroll Manager allow us to track the growth and progress of our clients and allocates their efforts to the myriad of tasks performed throughout the organization.”

- **Business Management.** “Vertex Financial Manager allows us to invoice for products and services sold to our customers, receive and post payments, pay bills to vendors with whom we trade, pay our employees, and track our effectiveness throughout the two companies that comprise Columbia Industries and subsidiary, CI Support, LLC. This means that Financial Manager provides the basis of our monthly financial statements that are reviewed by leadership and the Board of Directors, which are captured in the Treasurer’s report that is generally accepted at the monthly board meeting. Surviving without the control and reporting functions provided by these two crucial software packages is as unimaginable as attempting to run an organization without leadership; chaos would immediately ensue,” stated Kay Hamilton.



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