

Self-Service Data Prep Saves Marbridge Thousands of Man-Hours in Meeting Reporting Requirements



The Marbridge Foundation

A nonprofit community for developmentally disabled adults, Marbridge has been recognized for its groundbreaking approach to serving people with special needs. The Foundation provides housing, training and a wide range of services to nearly 250 residents.



Compliance requires a detailed view into payroll data

As part of the Affordable Care Act, employers such as Marbridge are now required to provide the IRS with detailed reporting on insurance coverage provided to full-time employees and their dependents. To ensure compliance, the Foundation needed to analyze current and past hours worked for more than 300 employees to determine eligibility, calculate the employee share for each person offered coverage, and more. Unfortunately, the Marbridge payroll system was not equipped to distill the data needed, and could provide only part of the needed data in PDF form.

As a nonprofit serving intellectually challenged adults, Marbridge needs to be careful stewards of every dollar spent. They knew that hiring a temp agency to manually key in the necessary payroll data would be cost prohibitive, and potentially prone to errors which could cost tens of thousands of dollars in IRS penalties.

Automated data preparation saves time and assures accuracy

A customized Altair template extracted the IRS-required information, allowing Marbridge to access and clean current and historic payroll information previously locked in PDF files. Preparation was quick and automatic, saving an estimated 2,000 to 3,500 man-hours of manual reentry.

Altair's unique ability to automatically pull and prepare data from a wide range of difficult-to-access report formats, such as PDF, XML, HTML, text, spool and ASCII files— enabled

Industry

Nonprofit

Function

Adult Residential Community

Challenge

New IRS regulations mandated by the Affordable Care Act required the Foundation to provide detailed reporting on current and past payroll data. However, the nonprofit's systems could not provide the information necessary, and data output was in the form of PDFs.

the organization to pull in structured and unstructured data from payroll records, invoices, sales reports, balance sheets and more. In addition, Altair includes more than 80 pre-built functions designed specifically to clean and transform incomplete and inaccurate data into accurate, analysis ready data with just a few clicks.

Altair delivers

With the IRS reporting requirements now under control, the Foundation is confident in the accuracy of their submissions. That's good news, as nonprofit organizations tend to be risk averse when it comes to the possibility of a costly government audit.

Now plans are in the works to use Altair to scan all employees' past W-2 forms and link them to HR files, giving the organization a central repository for all payroll information. The Foundation is also looking into how Altair can help institute a new 401(k) program.

As they become more familiar with the platform, Marbridge is finding opportunities to use Altair capabilities to save time and money and enhance accuracy across a variety of HR and financial processes.

"Altair has saved us so much time and money, it's hard to even quantify. What's more, the platform has given us one place to go for all the answers. For example, if someone in the organization asks for all the payroll information for the past two years, we can instantly give them what they need."

David Erps
Vice President of Finance, The Marbridge Foundation

Solution

Through automated data preparation, Altair enabled the Marbridge team to access information locked in PDFs and generate reports without upgrading systems or contracting for thousands of hours of temporary help.

Benefits

The Altair solution saved the Foundation thousands of man-hours, minimized costs and reduced their risk of penalties for errors, allowing them to efficiently meet reporting requirements with confidence.

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