

DENTAL HEALTH IQ

SCOPE OF AUTOMATION

- Payroll & Commissions Accounting
- Bonus Calculation
- Data Aggregation

THE CHALLENGE

Each pay period, Dental Health IQ's accounting team had to gather and manually process data from employees to compute hours worked, overtime, PTO, bonus, etc. Considering that it was not economical to pay for an HR software, all employees entered their clock-in and clock-out data in a spreadsheet. Payroll was done by taking information from a number of tabs in a spreadsheet and compiling all that information into aggregated totals for each month. Since the compensation varied not just by title alone, but also by role, seniority, and other variables, the calculation was not straightforward. Accounting for month-end employee bonuses was also done in a spreadsheet before being posted to QuickBooks. Bonuses were determined based on a model which considered several parameters related to revenue and performance. This entire process was repeated manually several times per month and wasted precious time. Inaccuracies in calculation and human error were prevalent throughout the process.

(Continued Below)



DENTAL HEALTH IQ

WHY PLENA DATA?

Plena Data fully automated and streamlined the accounting, payroll, and commission process for Dental Health IQ. During each pay period, employees now simply enter their hours into the Plena Data platform and the rest is automated. Accountants login to the platform to download a pre-built and fully automated spreadsheet with data ready to be imported into Quickbooks. No more wasting time - no more data and reporting inaccuracies! And now it only takes a few minutes to prepare tax documents and generate year-end numbers. Plena Data automatically generates figures for each pay period and all historical data is always available in real time.

CLIENT PROFILE

Dental Health IQ is a privately owned dental practice specializing in orthodontics, dentistry, and Invisalign treatment. The group treats thousands of patients each month and has gained the reputation of providing superior care at competitive prices.

Data Sources: QuickBooks, Dental Software, Spreadsheets

"They took all of our data from all of the different computer programs and gave me a one page report! I don't have to open 4 different programs anymore to gather my data."

