



Case study

HCR ManorCare returns to ONESOURCE after a one-year hiatus, missing the easy-to-use product functionality and attentive client support.

Overview

HCR ManorCare switched from Thomson Reuters® ONESOURCE to a competitor with the promise of similar functionality at a reduced cost. Although they were long-time ONESOURCE® fans, the team worked to learn the ropes of the new solution — ultimately discovering that the cost of the switch was higher than expected because of the additional time spent trying to figure out the new system. After one year, they returned to ONESOURCE Income Tax. ONESOURCE was the only tax technology that offered a complete suite of applications that manage every step of the tax process, from workflow to compliance. It was important to HCR ManorCare to know they would have a tax partner that would grow with them over time.

ONESOURCE differentiators

After using the competitor's product, and feeling that the new software was "not easy to use," Federal Tax Manager Andrea Sype looked forward to returning to the simple, consistent, and modern user interface of ONESOURCE that she and her team had previously enjoyed.

- **Implementation:** Learning that the competitor's self-guided process was not ideal for their team, the HCR ManorCare tax department was glad to have a local Thomson Reuters implementation team assigned to their account. They also have a dedicated implementation manager, an account manager, and a local client success manager available from Thomson Reuters to answer questions on the spot and personally guide them through the reimplementation.
- **Product support:** HCR ManorCare was looking for more than email support for the tax applications they license — support being one of the most important benefits to any software provider. With options ranging from phone to web-based and local client service manager support, ONESOURCE stood out as a reliable alternative. "You know what to expect with support...you know [they'll] work with you to fix the problem."
- **Familiar processes:** HCR ManorCare succeeds when their system allows them to work on their returns in a familiar but more efficient way. When spreadsheet-based screens and unique naming processes for document types proved difficult, they looked to ONESOURCE where they could use their own general ledger and true IRS or state form numbers along with other intuitive features included in the ONESOURCE application.

"ONESOURCE works for us because it makes our job easy. My job shouldn't be spent trying to understand how software works...It gives us peace of mind. We're not answering questions all day, we're not spending countless hours trying to file the return [which] should be the easiest thing we do."

Andrea Sype
Federal Tax Manager
HCR ManorCare

Spotlight on HCR ManorCare

HCR ManorCare is the leading provider of short-term, post-hospital services and long-term care with a network of approximately 500 skilled nursing and rehabilitation centers, memory care communities, assisted living facilities, outpatient rehabilitation clinics, and hospice and home health care agencies.

Tax department snapshot:

- Headquarters: Toledo, OH
- Department size: Less than 10

Solutions at work:

- ONESOURCE Income Tax
- Checkpoint®

ONESOURCE results

“We can get everything done quicker, earlier, with no one working through lunches or working overtime.”

Once the team returned to ONESOURCE, they saw a marked difference in operations. Although ONESOURCE had several enhancements since they last used the software, the updates were easy to learn, “very useful”, and helped to facilitate the quick completion of their work.

- **Easier to use:** “[The tax team] knows how to navigate the software and find what they need.” Since ONESOURCE is built by tax accountants for tax accountants, it’s intuitive for them to use.
- **Standardized returns:** With the standardized templates and grids in ONESOURCE, the platform provides a way for the tax team to quickly generate uniform returns across multiple entities and across various states.
- **Simple state apportionment:** Easy-to-use state allocation and apportionment workpapers, customizable state taxable income workpapers, and configurable state logic make the state process much smoother for the tax team.
- **Holistic and scalable:** The tax group was looking for a vendor with a comprehensive platform offering provision, workpaper, and process standardization so the solution could grow with them.

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Additional benefits

“The shorter our compliance season becomes, the more we can devote to tax savings.”

- **Time savings:** Less time spent on researching how to use the system and on how to file the return.
- **Partnering strategically with the business:** The tax department adds value to the business by devoting more time to analysis, enabling tax savings and effective tax planning.
- **Quality of life:** Better work/life balance as less hours are spent on the overall return process.
- **Peace of mind:** “I’m confident that what I’m putting in is only affecting what it should be.” On the state apportionment side, “everything makes sense, and [the workpapers and returns are] supportable for audit.”