

INDUSTRY CASE STUDY

HEALTHCARE

FINANCIAL DATA AUTOMATION

Hourly financial data, **zero**
PII exposed

Hourly

DATA FEEDS

0

PII EXPOSED

0

INTERRUPTIONS

Months

TO FULL ROI

Hourly financial data, zero PII exposed

A multi-facility elder care group's legacy automation kept failing, forcing staff to **pull transaction logs by hand**. Simpatico rebuilt the pipeline — PII-safe, hourly, and monitored — so **failures fix themselves before anyone notices**.

CLIENT	SECTOR	ENGAGEMENT	ROI
Multi-facility elder care & rehabilitation group	Healthcare	Secure transaction data automation & monitoring	Within months

THE CHALLENGE

When the automation fails, the analysts become the automation

A healthcare group running elder care, medical care, and rehabilitation facilities depended on transaction data to track costs, monitor capacity, and reconcile billing. But its legacy financial data automation kept breaking — and every failure pushed the manual work back onto people.

Failing legacy automation

01

The previous automation broke frequently, forcing analysts to manually pull transaction logs just to keep reports moving.

Slow, blind reporting

02

Manual pulls slowed reconciliation and left leadership with reduced visibility into facility performance.

PII on the line

03

Any solution had to move financial data without disclosing personally identifiable information — non-negotiable in healthcare.

Compliance risk

04

Failed or delayed reporting created compliance gaps and operational inefficiency across every facility.

A pipeline that's secure, hourly, and watches itself

As their Managed Intelligence Provider, Simpatico rebuilt and secured the entire transaction log automation — extracting and syncing data across systems without touching operations.

1

Discovery & design

Simpatico evaluated the prior automation failures, identified the gaps in monitoring and data transfer, and redesigned the workflow for consistency and security.

FIND THE FAILURE POINTS

2

PII-safe extraction

A secure script pulls PII-safe transaction logs from the vendor's SQL database — financial teams get the data they need without ever touching protected information.

SECURE AT THE SOURCE

3

Hourly SFTP pipeline

Encrypted uploads run every hour via SFTP, keeping transaction data continuously current for reconciliation and forecasting across all facilities.

FRESH EVERY HOUR

4

Monitoring that opens its own tickets

If a transfer or restoration fails, automated monitoring creates a support ticket immediately — issues get resolved before they ever impact reporting.

FAILURES AUTO-TICKETED

THE RESULT

Continuous reporting, restored everywhere

The rebuilt financial data automation removed manual data gathering entirely and reestablished continuous reporting across all facilities — timely, accurate financial insight for analysts and management.

Hourly

transaction data feeds
was manual pulls

0

data interruptions
proactive monitoring

Real-time

reconciliation
and improved forecasting

Months

to full ROI
efficiency + error reduction

SECURITY & COMPLIANCE

PII-safe by design

In healthcare, a data pipeline is only as good as its handling of protected information. The extraction was designed to exclude personally identifiable information from the start — so analysts get complete financial visibility while patient data never leaves the source system.

That design turned a compliance liability into a strength: fewer staff hours lost to manual log extraction, lower risk from failed or delayed reporting, and faster reporting cycles across every facility — with automation that scales as the group grows.

"In healthcare, the pipeline has to be as safe as it is fast."

→ Manual log extraction **eliminated**

→ PII exposure **zero by design**

→ Failed transfers **auto-ticketed**

→ Reporting cycles **faster at every facility**

HOW WE HELPED

What a Managed Intelligence Provider does

Strategic Process Design

Identified gaps in the legacy automation and re-architected for security, compliance, and reliability.

Automation & Scale

An hourly, secure SFTP pipeline that handles high-volume transfers consistently.

Proactive Monitoring & Support

Automated failure detection with ticket generation — issues resolved before reporting feels them.

Continuous Optimization

Ongoing tuning of performance, security, and scalability as the business evolves.

Healthcare financial data automation, answered

Can you automate financial reporting in healthcare without exposing PII?

Yes. In this case study, Simpatico built a secure extraction script that pulls PII-safe transaction logs from the vendor's SQL database — financial teams get complete transaction data for reconciliation and forecasting while personally identifiable information never leaves the source system. That design kept the healthcare group compliant while restoring real-time financial visibility.

What is transaction log automation?

Transaction log automation is financial data automation applied at the source: transaction records are extracted from operational systems and delivered to reporting and analysis tools automatically, on a schedule, without manual pulls. In this engagement, encrypted uploads ran hourly via SFTP, giving analysts continuously current data for tracking costs, monitoring capacity, and reconciling billing across all facilities.

What happens when an automated data transfer fails?

In a well-designed pipeline, the failure reports itself. Simpatico added automated monitoring that creates a support ticket the moment a transfer or restoration fails, so the issue is detected and resolved before it ever impacts reporting. That's the difference from the group's legacy setup, where failures went unnoticed until analysts found themselves pulling data by hand.

How often should financial data sync for reporting?

It depends on how the data is used, but for active reconciliation and forecasting, hourly is a strong standard. This healthcare group moved from unpredictable manual pulls to hourly automated feeds — frequent enough for near-real-time reconciliation and reliable forecasting, without burdening the source systems that run daily operations.

What is a Managed Intelligence Provider (MIP)?

A Managed Intelligence Provider goes beyond traditional IT support to build and maintain the intelligent, automated data infrastructure a business runs on. As this group's MIP, Simpatico re-architected the failed automation, secured it for healthcare compliance, added proactive monitoring, and continues tuning performance and scalability as the organization grows.

LET'S TALK

Is a fragile data pipeline putting your reporting at risk?

If failed automations, manual data pulls, or compliance concerns are slowing your financial reporting, there's a more reliable way to run it. Let's design a pipeline you never have to think about.

[Schedule a Strategy Session](#)



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