

## CASE STUDY

DocuWare

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## Berwick Retirement Communities



Happier residents, vendors and employees - thanks to secure digital processes.

### About the customer:

A growing retirement homes builder and operator digitizes vendor invoice processing and HR tasks to streamline their procedures, improve internal communication and optimize organizational success.

### Challenges:

- Complex vendor invoice approvals and payment process
- Missing and duplicated paperwork created frustration
- Manual effort tracking down invoice payment status wasted time



**"DocuWare is keeping us more organized. We can see exactly how many invoices are awaiting approval and we can now remind managers to approve them. Our Chief Operating Officer can remotely view and compare past invoice amounts and plan for future budgeting."**

**- Jenny Jessa**  
Manager of Special Projects,  
Berwick Retirement Communities, Victoria

Family owned since 1989, Berwick Retirement Communities builds and manages retirement homes in British Columbia, Canada. To operate its seven homes, the company employs over 1,700 vendors and processes about 1,000 invoices a month for catering, housekeeping, personal care and nursing supplies and other essentials.

With seven retirement homes to operate and another scheduled to open in 2022, two head offices in different locations and one construction company, Berwick had a complex process of vendor invoice approvals and payments. To collect the necessary signatures and approvals, the invoices had to circulate between different offices, in paper or email form. Often, several copies were made in different locations adding unnecessary redundancy and complexity. Staff had to call different offices to locate the invoices and ensure all signatures were collected. Sometimes when vendors called to inquire about payments, Berwick personnel weren't able to locate specific invoices and had to contact other offices to track down the missing paperwork.

Processing invoices through DocuWare allows Berwick to store and recall invoices for billing, audits and job costing. "We would end up having several copies of invoices in mail or email form", says Jessa— but that still did not mean that the invoice would be easy to find when needed. "Sometimes a vendor would call and ask, 'Where is my payment on this invoice', and we didn't know where the invoice was. We needed to improve our workflow process."

### **Easy switchover and a dedicated DocuWare support person**

The company purchased DocuWare in 2018 and switched over in November that year. Due to Berwick's specific requirements, the DocuWare accounting module had to be customized to fit the company's data entry needs. DocuWare specialists helped Berwick build their customized version of the accounting system. The training and switchover process was smooth and easy. The company also values having a dedicated DocuWare



support person who is responsive and knowledgeable. "I feel like I know him personally," Jessa says. "He is always there and he responds to my emails usually within a day."

### **Digitizing records improves organization and communication**

Installing DocuWare allowed Berwick personnel to digitize all invoice processing. Staff can now pull up multiple invoices on the screen, add notes to an invoice, or compare current invoice amounts to those from previous months to ensure correct sums. DocuWare allowed for better transparency in locating invoices and accessing them remotely from other locations. "Our COO can access invoices from his home office in Vancouver," Jessa says.

### **Easy software integrations mean less paper usage**

Currently, Berwick maintains over 34,000 digitized documents. Integration with their payroll system is planned for the future allowing information from forms to be uploaded directly, saving data entry time and errors. A seamless integration between these two systems is another way that HR processes will be more streamlined.





Company personnel also appreciate that DocuWare helped relieve them of clutter and paper loss. “We no longer have to worry about things like, ‘Oh, I accidentally filed that paper into the shredding box,’” Jessa says. The company shredded about 90 boxes of paper accumulated over a few years.

### HR processes go digital

Following the invoicing setup success, the company configured DocuWare to manage many of their HR processes such as job postings, new employee onboarding, managing a change of position, termination or resignation, and managing the regular performance review process. This involves 12 forms and 36 workflows,

some of which are interlocking workflows that are part of the same process. Managers are notified of expiring documents and important dates within the HR process, alleviating their need to keep track manually. A new form and workflow are currently being built to manage Personal Time Off requests and the associated approvals.

### Safe archiving and faster secure file retrieval

Berwick securely stores the master employee records for 627 staff members as well as their associated documents - approximately 2,569 HR related documents in DocuWare file cabinets. “We are growing,” says Jessa, “so the ability to add more documents to DocuWare in the future is important.”

**Discover how Ricoh can streamline your manual processes and help you better support your remote workforce. [Contact us now.](#)**

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