

*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.*



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



"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."



- Location:** Canada
- Industry:** Retirement Homes
- Deployment:** On-Premises
- Department:** Finance, HR

**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

*"Our people no longer have to deal with a bunch of paper on their desks."*

*"The point of having DocuWare was to improve our workflow process. It allows us to have one system and know where all our invoices are at every stage."*

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."

*"We shredded 90 boxes of paper accumulated over several years. Now we never have to call each other looking for an invoice."*



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