

# Senior Living Community Improves Flexibility, Scalability, and Efficiency with Square 9

**Case Study:**  
Covenant Village  
With Cory Sills, Technology Director

**Departments Impacted:**  
Accounting, Human Resources

**Objectives:**  
Implement an intelligent information management solution to improve accounts payable processes and scale with growing needs.



## Meet Covenant Village

Covenant Village is a premier senior living community, providing a warm and welcoming environment that offers residents the choices and convenience to live fully. Featuring independent living options such as cottages, one-bedroom, two-bedroom, and studio apartments, as well as assisted living options with skilled nursing staff and a memory care unit, Covenant Village has earned a strong reputation throughout its four decades of service thanks to its steadfast commitment to upholding each person's longing to live with respect and compassion.

## Challenge

Previously, Covenant Village had been using a competing solution to manage its information, but it began experiencing growing pains as it expanded due to the lack of customization, flexibility, and scalability this solution offered.

Covenant Village quickly realized it needed a more customizable, flexible, and scalable solution to meet its growing needs, especially in its accounts payable department, where new vendors and increasing invoice volumes continued to affect efficiency.

## Solution

Covenant Village was introduced to Square 9 through its long-time partner Sharp, a provider of its office solutions. Square 9's platform offered all the functionality Covenant Village sought, including the much-needed flexibility and customization.

"We started talking with Square 9, and you seemed to check all the boxes we were looking for," explained Sills.



"The previous solution just didn't have the customization. We needed something that could change with our own processes as we grew. The previous solution just didn't do that, and whenever we needed to make a change, we would typically have to buy a block of 10 hours for something that would take 20 minutes,"

*Cory Sills, Technology Director*

Covenant Village was also impressed with Square 9's web forms, which it plans to implement in the second phase of its implementation.

"The vast majority of our forms are still paper," explained Cory Sills. "Getting electronic forms into a consistent format will be easy for everybody to use," said Sills.

The first implementation phase was incredibly simple and straightforward despite a relatively rushed timeframe due to the timing of its previous solution's contract.

"It was a really good implementation despite somewhat of a rushed timeframe," said Sills. "The Project Manager couldn't have been better. He walked us through everything we had to do. We wanted to make some changes to our internal processes, and he made what we wanted work," explained Sills.

### Benefit

Once trained, Covenant Village's staff quickly adopted their new solution. Square 9 offered the customizability and flexibility to adhere to Covenant Villages' new processes, including its invoice review process and multi-level approvals. Covenant Village was especially impressed with Square 9's AI-powered document capture solution, TransformAI, which improved accuracy over its previous capture system.

"The other solution's document capture didn't really work all that well, so we wound up having to type most things in any way. But Square 9's capture solution has worked really well," mentioned Sills.

Sills also estimates that TransformAI has saved significant time for each department.

"With the previous solution, each department had to go in, tell it what account it belongs to, put in the amount, put in the vendor, and put in if it's taxed or not," explained Sills. "But with TransformAI, the department gets the invoice, either approves or rejects it, and then they just

click a drop-down that tells it what account it belongs to, and it moves on," said Sills.

In addition to the newfound flexibility and time savings, the web forms, planned for future implementation, are also anticipated to streamline several Human Resources processes, including employee reviews and personal action forms.

"HR is really excited about the web forms because they're busting at the seams with paper and file cabinets that they don't want anymore," mentioned Sills. "They'll be able to control how those processes go after the supervisor sends those forms out and who they go to next," said Sills.

### Results

When asked what Covenant Village has been most impressed with, Sills mentioned TransformAI, adding that it helps eliminate the guesswork in Covenant Village's accounts payable department.

"It saves our AP staff a lot of time since they're not sitting there trying to figure out information." "They don't have to ask themselves, 'Is this invoice right? Do I have everything right? Am I typing this out, right? Am I being consistent?'" explains Sills.



"I would definitely recommend Square 9, and I would tell others just to make sure that they have their internal processes in line. You can, of course, come up with new things as you go through the implementation process, but having a general idea of what you're looking for helps them provide what you're looking for."



Cory Sills, Technology Director