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Carebase, leading operator of elderly care homes, uses DocuWare Cloud to automate the exchange of data between the facilities. Through the no-code or low-code platforms Make and Microsoft Power Automate, error-free reporting is generated on a weekly basis.

Vasan Velayutham, Finance Director, Carebase, Wimbledon,

optimises quality management with DocuWare Cloud:

"Previously, our staff had to review all compliance documentation on a daily basis and manually transfer the data into the weekly report. Thanks to our cloud DMS and the new integration to Make, we fully automate reporting while still adhering to all compliance rules."

Location:	United Kingdom
Industry:	Healthcare
Deployment:	Cloud
Department:	Human Resources, Quality Assurance
Integration:	Make, Microsoft Power Automate

Carebase is a leading operator of retirement and nursing homes in the UK and runs a total of 15 facilities. The right atmosphere is an important factor for the success of the homes: Residents should always feel at home and at the same time receive the best possible care. Staff selection and quality management are particularly important in this respect; automated processes in staff recruitment and quality management ensure optimal working conditions.

Many nurses come from outside the UK, resulting in additional requirements for recruitment. In the past, HR created a paper-based checklist of required documents for each new hire. Documents were then sent back and forth between the homes. However, as recruitment increased, more and more problems within the process became apparent. For example, frequent scanning and printing as documents were exchanged made retrieval difficult and increased the risk of incorrect or older versions being used. At the same time, it was often unclear to those involved which documents were still needed to complete the process. Accordingly, Carebase wanted to optimise the entire process and, above all, make it digital. For this purpose, they examined different solutions.

After a convincing solution presentation by the DocuWare partner, the company decided on the cloud-based document management system (DMS).

Setup and training in just a few days

After just one week, the most important recruitment process was digitally mapped. The previous checklist is now created electronically and stored in the document pool. DocuWare then reminds both new recruits and the HR department of the required documents in a fully automated workflow. Authorised employees can view and edit documents at any time – without versioning errors. Once the documents are complete, the HR department closes the process with a click of the mouse. The complete personnel file then remains in the audit-proof archive in compliance with the law.

Simple integration into other cloud applications

After the successful implementation of the initial project, Carebase digitised other paper-intensive processes, such as process documentation in quality assurance: each home kitchen uses the daily "kitchen sheet" to record food serving or refrigerator and freezer temperatures. DocuWare Cloud not only takes care of digital document

"Our supporting sales partner fully adhered to all the schedules defined for the project. As a result, the DMS became by far the most effective IT project of our company. We would like to expand this cooperation in the future."

"It is not quite trivial to dynamically read out the right content from a large number of documents created on a daily basis and to create weekly reporting from this. Thanks to DocuWare Cloud and the integration in Make, we succeeded in this task in a surprisingly simple way and in a very short time."

storage, but also connects to other cloud applications such as Microsoft Power Automate via the iPaaS platform Make. There, the data is processed further and summarised for easier reporting. If an employee creates a new kitchen sheet, DocuWare extracts the relevant values and transfers them via Make to the weekly reporting document in Microsoft Power Automate. Whereas quality management used to pick out all the individual values from the daily reports and transfer them to the weekly document, the weekly Excel report is now generated and distributed automatically. And it does so every Monday morning with the values from the previous week for all homes.

Time savings and compliance security

The time saved because of process automation is immense, as manual compilation and checking of data is eliminated thanks to the integration. Carebase uses the freed-up resources to improve the quality of its service and to grow. Since the process optimisation, for example, the company

has not had to hire any additional administrative staff despite increasing documentation requirements. At the same time, DocuWare guarantees the highest level of compliance security through audit-proof and digital archiving of all confidential documents.

"Thanks to the excellent presentation by the DocuWare partner, we were already sure before signing the contract that the DMS would fully cover our current and future requirements."

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