

# How Uniting AgeWell automated their expense process with Weel and reduced 91% of admin time a month

With **Rubi Bhonsaria**, Accountant

## Company

A part of the Uniting Church Australia Group, Uniting AgeWell provides aged care services to over 1,000 people across Victoria and Tasmania. Their services include residential care, independent retirement living, at home care, essential shopping, transport and social support.

## Location

Victoria and Tasmania

## Industry

Nonprofit - Aged Care

## Expense Challenges



Manual staff expense reports



Managing cards for new & departing staff



Manual accounting data entry



Missing receipts and follow-ups

# The Challenge



## 480 hours a week spent on expense admin instead of critical client services

With over 1,000 elderly people relying on Uniting AgeWell to access the services they need to live the life they want, it's critical that Uniting AgeWell continually improves its care and support services. From client carers delivering new engaging activities, right through to the head office implementing technology to free up time for employees across the organisation, it is a joint responsibility for the whole company.

Helping with household chores, personal care, medication management, transport, grocery shopping and providing social activities are just some of the responsibilities of the Home Care Service team. Every minute they spend on administrative tasks is time taken away from providing these necessary services to their clients.

With an outdated employee expense management process, the Uniting AgeWell finance team found themselves spending over 180 hours every month, across 4 team members, reviewing Excel generated expense reports, chasing paper receipts and reconciling the month end balances for over 100 debit cards in the Home Care Service team - and this didn't include the hassle of issuing or cancelling cards for new and departing employees.

Of greater concern was the time the Home Care Service team were spending on their expense reports and sending in paper receipts. Rubi Bhonsaria, Accountant for Uniting AgeWell, estimates team members were spending up to 2 hours each week preparing expense reports and sending receipts to the finance team.

“With 148 employees, that's just under 300 hours each week that should have been spent providing additional support and care to their clients.”

**Rubi Bhonsaria**



# The Solution



## An all-in-one corporate card and expense management tool

Rubi and the finance team always knew they needed to make a change to their internal processes, but when their bank let them know they were discontinuing their debit card program in February 2020, they were forced into action. After searching for an all-in-one solution, Rubi and her team discovered Weel.

With the ability to issue new cards in less than 10 seconds with financial controls tied to the organisation's expense policy built in, Rubi knows introducing Weel has “changed things in a big way”.

Rubi uses the budgeting tool in Weel to track, control and report on spending at each home care service location. And with automatic transaction coding, and custom fields to track expenses against individual clients, the month end accounting work is completely automated.

Implementing a digital solution “couldn't have come at a better time”. Uniting AgeWell rolled out Weel just prior to the COVID-19 pandemic and with virtual cards and digital receipt capture, the entire expense management process became contactless and eliminated double handling – it was the perfect solution.



# The Result



## 464 hours saved every week and a renewed focus on providing quality client services

Fast forward to September 2020, and now Rubi, by herself, spends a total of 2 days each month to complete the expense management process, including the month end work. That's a time saving of 164 hours or 91% of admin time spent a month.

For the client officers, each transaction is reported on the spot and "reconciled at the time of purchase" - saving 300 hours across the team every week. The best part? Rubi knows first hand the client officers are "very happy using Weel" as they can now provide even more of their time and energy to their clients.



Transitioning to aged care shouldn't mean giving up the things in life you love. Instead, aged care is what allows us to continue getting the most out of life with the support and care we need. With a problem solving mindset, Uniting AgeWell has leveraged Weel to put them in a better position to service their clients and achieve their goals.