



Customer Profile

For over 45 years, Revera has been offering choices in community living, warm hospitality and compassionate care. Revera has over 220 retirement and long term care homes, including 40 homes in select U.S. locations. Revera is a fully owned subsidiary of a Canadian federal crown corporation – the Public Sector Pension Investment Board

Industry

Healthcare

Location

Mississauga, ON

Revera's Legal Department Realizes Time Savings of up to one Month per year with Legal File Management Solution

"Ideaca rapidly deployed a low-cost Legal File Management solution that will significantly reduce the time our Legal team spends on administrative and manual tasks."

**Melanie Steele, Manager Legal Services
Revera**

Business Situation

Revera's legal department deals with an abundance of paper as well as electronic files on a daily basis. Although Revera's legal team had a standard and well recognized process around paper records, most of their electronic records were siloed in email inboxes, the local network or burned onto disc. Key issues included:

- The management of matters, documents and invoices was problematic as Revera had a manual process for managing paper and electronic files
- Reports to manage matters - deadlines, statuses and invoices - were tedious to generate manually from Excel
- When invoicing, allocating expenses to each matter was time-consuming and difficult as the accounting team manually allocated all legal expenses to one GL account

Solution

Revera needed a cost-effective solution that could show real results on a short implementation timeline. Ideaca met with Revera's legal team to define their taxonomy and to come up with key terms and fields that they needed to quickly find documents or report on critical information. After the groundwork was completed, Ideaca delivered a Legal File Management Solution based on Microsoft SharePoint Office Server (MOSS) 2007. The project was completed within an eight week timeframe and included the following key features:

- Specialized document libraries, content types and metadata
- Security controls to limit access to authorized personnel, instant "filter as you type" functionality, faceted search and industry-specific add-ons to enable ease of use
- Added invoices to SharePoint list allowing instantaneous report pulling
- Specialized views that could be used for reporting, exported to Excel for further analysis or used by MS-Access to create reports for management

Benefits

- Annual time savings for the legal team of up to one month for inputting data, managing matter data and creating reports
- Elimination of duplicative data entry and report generation between legal and risk management departments
- Invoice reporting can now be generated instantly
- Central repository for all matters, documents and invoices that can be searched, filtered and accessed by legal and other departments as permitted
- Time savings and risk reduction from reduced dependency on paper and manual processes