

Case Study:

Automating Administrative Workflows to Improve Efficiency and Visibility



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Organization Name:

Presbyterian Homes & Services (PHS)

Main Contributor:

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Organization Type:

Senior Living and Healthcare Services

Organization Description:

Presbyterian Homes & Services (PHS) is a mission-driven, not-for-profit organization dedicated to enhancing the lives of older adults through compassionate care, vibrant communities, and innovative services. With a growing network of senior living communities and care services, PHS focuses on creating environments where residents can live with dignity, independence, and support.

As the organization expanded its services and operational footprint, the need to streamline internal processes became increasingly important. Several administrative workflows relied heavily on email communication, manual documentation, and decentralized data management. These processes often required significant coordination across teams, leading to slower turnaround times and limited real-time visibility into request status.

To address these challenges, PHS partnered with NuAig to implement intelligent automation and digital workflow solutions. By leveraging technologies such as Power Apps, Power Automate, a central repository, and an email system, PHS began modernizing several key operational processes.

Through this initiative, PHS has built a more efficient operational environment that reduces administrative burden and improves transparency across departments. This transformation enables staff to spend less time managing processes and more time supporting the communities and residents they serve.

Project Description

Presbyterian Homes & Services partnered with NuAig to modernize a series of administrative workflows that previously relied on email-driven processes and distributed documentation practices. These workflows included document management, internal service requests, and account administration activities that involved multiple steps and frequent follow-ups.

As these workflows grew in complexity, staff often tracked requests manually, managed approvals across email threads, and organized records across multiple systems. This approach constrained operational efficiency and reduced visibility into process status and completion timelines.

NuAig collaborated with the information technology (IT) team to implement and configure the processes nominated by Presbyterian Homes & Services for automation and structured digital workflows. The objective was to streamline administrative tasks while improving transparency and governance across the organization.

The resulting solutions combined automation with digital request forms and structured document management. These improvements created a connected workflow environment where requests can be submitted digitally, routed automatically, and tracked through completion.

Automation Impact Snapshot

The automation initiative delivered measurable improvements across several administrative workflows within Presbyterian Homes & Services.

Key outcomes include:

- Automation of multiple high-volume administrative processes
- Significant gains in operational efficiency related to document handling and system administration
- Faster onboarding and offboarding through automated account workflows
- Improved governance and visibility across internal request processes
- Centralized document storage and standardized record management
- Transition from email-based coordination to structured digital workflows
- Creation of a scalable automation framework to support future growth

System Type

- Automation Platform: Power Automate
- Application Development: Power Apps
- Communication Platform: Organization's email system
- Identity and Directory Integration: Active Directory
- Operational Systems: Internal and third-party platforms

System Embodiment

Automation

Automation workflows manage repetitive administrative tasks including data handling, request routing, and account management.

Digital Workflow Applications

Power Apps forms provide centralized interfaces for employees to submit requests for IT services, analytics, and facility-related initiatives.

Document Management

A centralized repository is used to manage requests, documents, and process records in an organized and structured manner.

Notifications and Alerts

Automated notifications are delivered through email to ensure timely approvals and keep stakeholders informed throughout each workflow.

Implementation Approach

The implementation began with configuring and streamlining existing administrative workflows within Presbyterian Homes & Services. NuAIG worked closely with the IT team to implement and configure the nominated workflows and support process automation initiatives. The project followed a structured approach:

- Conducted discovery sessions to understand current processes
- Identified workflows requiring significant administrative effort
- Designed automation strategies and digital workflows
- Developed Power Apps forms and Power Automate workflows
- Implemented automation for repetitive administrative tasks
- Collaborated with stakeholders throughout testing and deployment

This approach ensured that the solutions were designed with end users in mind and aligned with operational requirements.

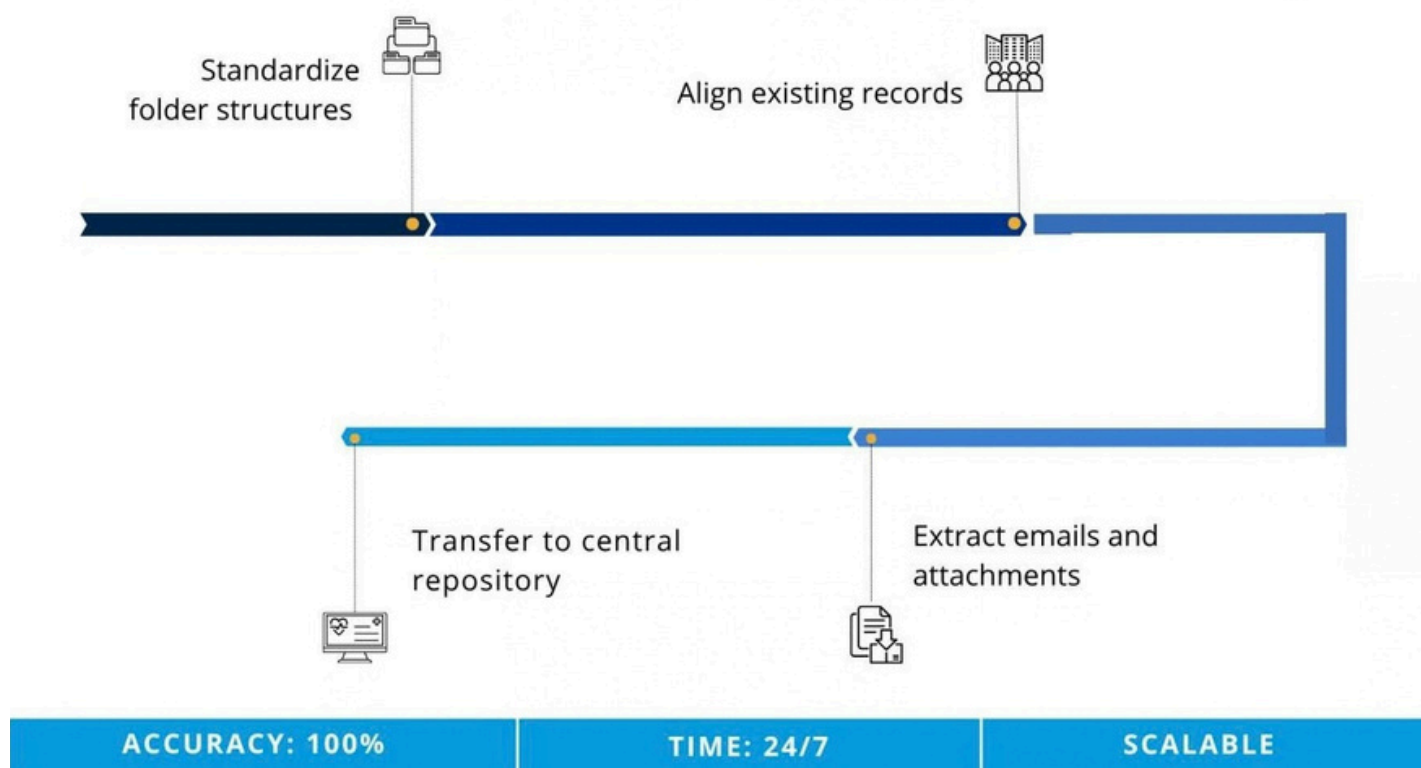
Process Automation and Digital Workflow Solutions

1. Business Data Migration (One-Time Process)

Managing business data within email systems previously required teams to manually download emails and attachments and organize them into shared folders. This approach led to inconsistent naming conventions, fragmented folder structures, and significant administrative effort. To address this, a one-time automated migration process was implemented to standardize how business data is organized and stored. The solution aligned folder structures across systems and systematically transferred records into a centralized document management environment. This improved consistency, reduced manual effort, and established a structured foundation for long-term data management.



Business Data Migration (One-Time Process)

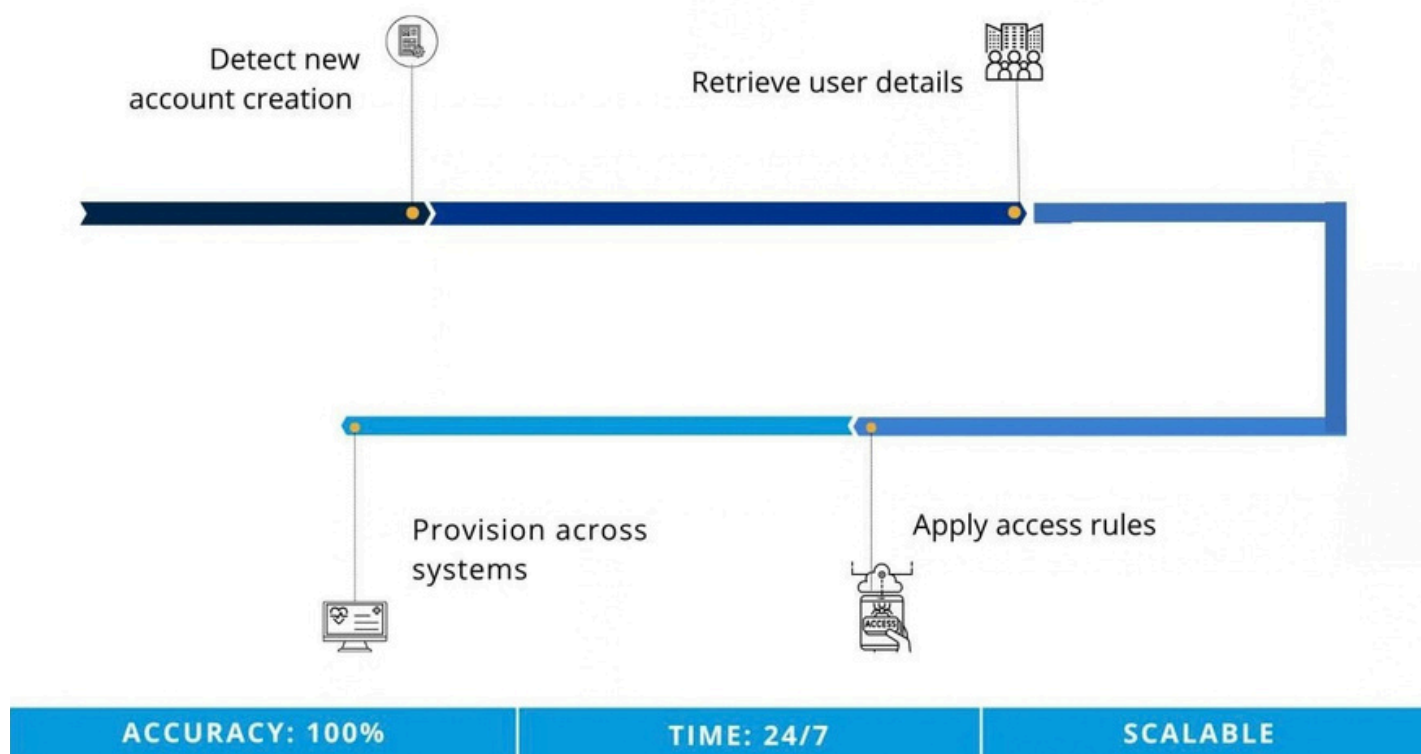


2. Account Provisioning Automation

Account provisioning across operational systems previously required manual setup, including profile configuration and access assignment. This process involved multiple steps and coordination, often leading to delays and inconsistencies. An automated workflow was implemented that gets triggered for every new hire and retrieves relevant user details from directory systems. Based on predefined rules, the system provisions accounts and assigns appropriate access across required platforms. This ensures faster onboarding, consistent access management, and reduced dependency on manual intervention.



Account Provisioning Automation

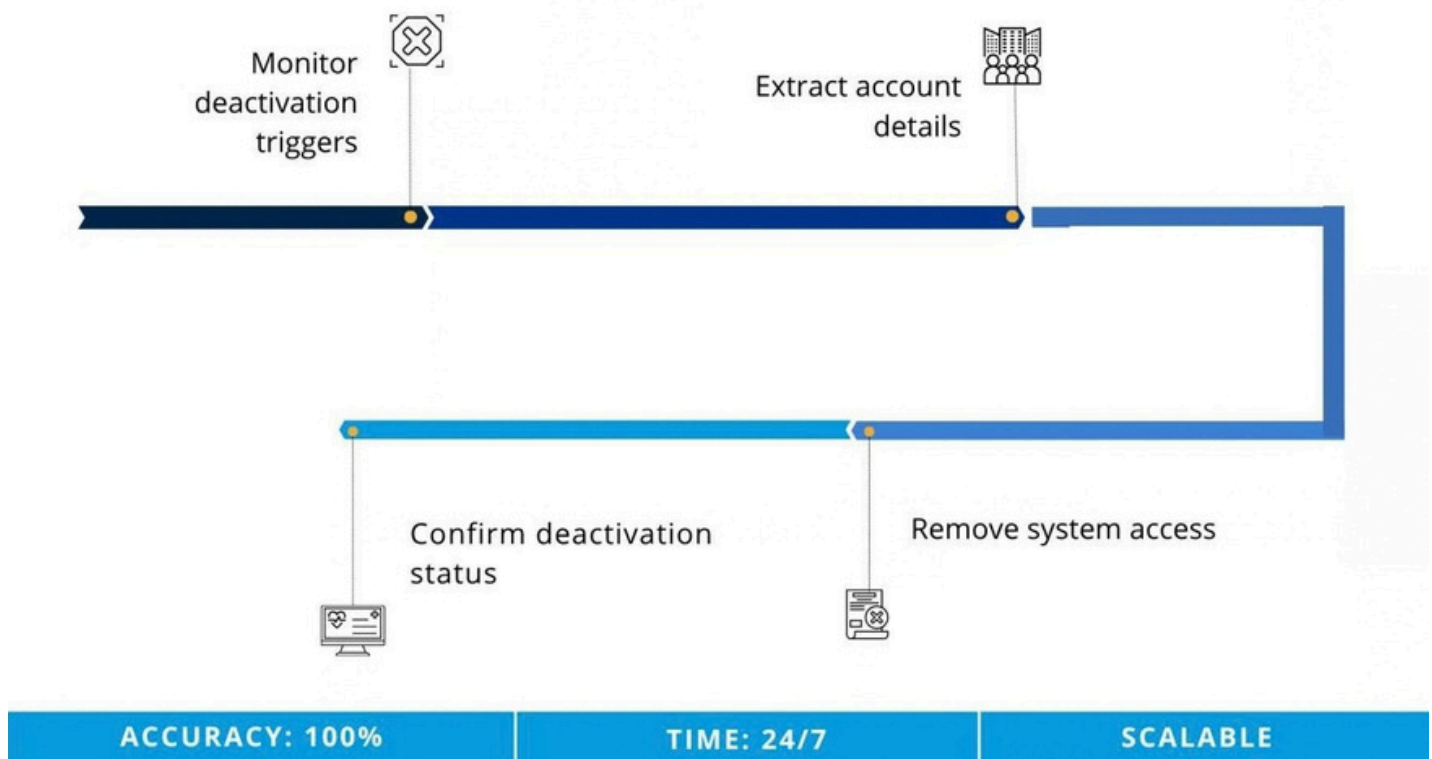


3. Account Deactivation Automation

Account deactivation was previously handled manually upon receiving notifications, requiring IT teams to locate and disable access across systems. This approach depended on timely action and could lead to delays, increasing potential security risks. An automated solution was introduced to monitor deactivation triggers and initiate the process without manual involvement. The system extracts necessary details and ensures that access is removed consistently across platforms. This improves operational efficiency while strengthening security through timely and reliable account management.



Account Deactivation Automation

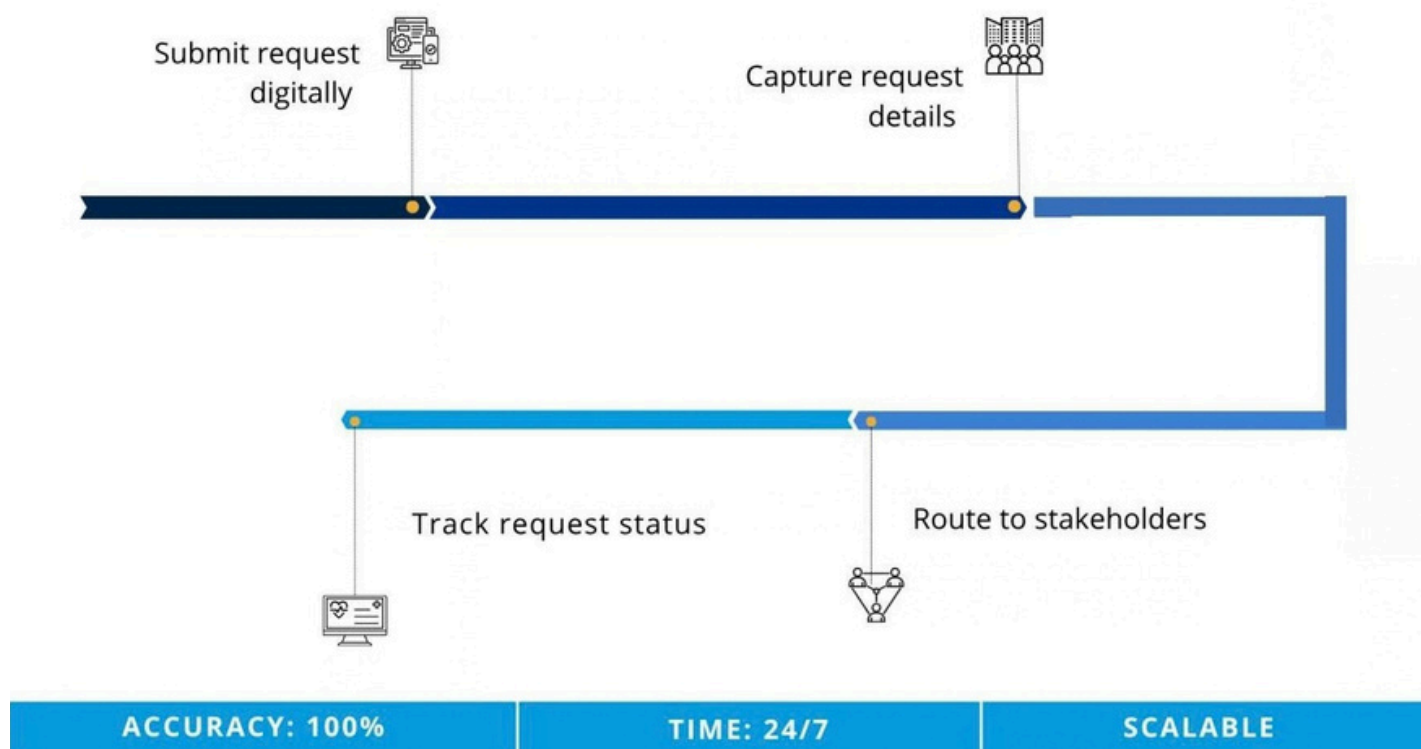


4. IT Request Workflow Automation

IT service requests were previously submitted and managed through email, resulting in fragmented communication and limited visibility into request status. Tracking and managing approvals required manual follow-ups, leading to delays and inefficiencies. A digital workflow was implemented to enable structured submission of IT requests through a centralized interface. Requests are automatically routed to the appropriate stakeholders based on predefined criteria and organizational roles. This provides real-time visibility, improves accountability, and streamlines the overall request management process.



IT Request Workflow Automation



5. Analytics and Reporting Request Workflow

Requests for analytics and reporting solutions were previously handled through informal communication channels, making it difficult to prioritize and track progress. This lack of structure resulted in limited visibility and inconsistent handling of requests. A standardized digital workflow was introduced to capture request details in a consistent format. The system routes requests through predefined approval processes, ensuring proper evaluation and prioritization. This improves transparency, enhances coordination, and enables more efficient delivery of analytics solutions.



Analytics and Reporting Request Workflow

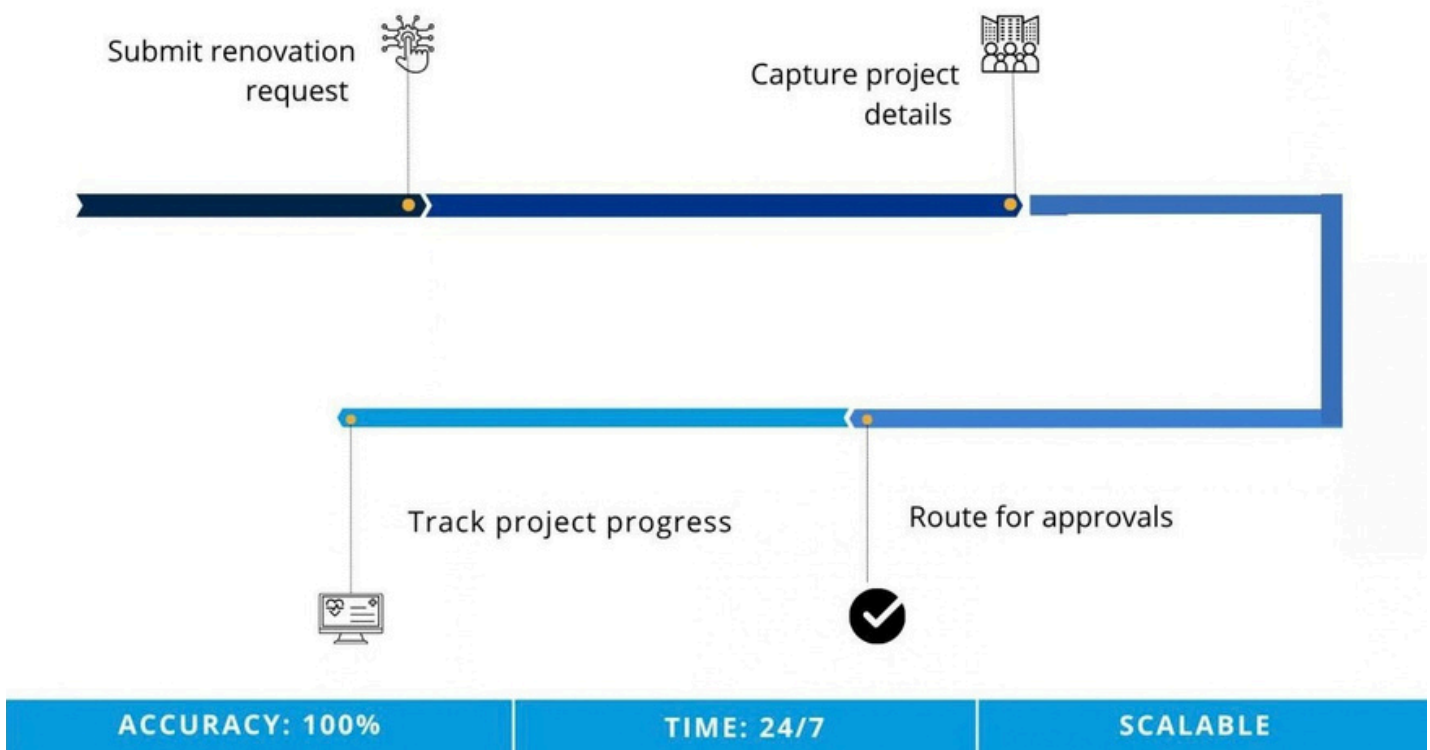


6. Renovation Request Workflow

Renovation and facility-related requests previously involved multiple stakeholders and were managed through informal communication methods. This made it difficult to track progress, manage approvals, and maintain consistency across requests. A digital workflow solution was implemented to standardize the submission and approval process. Requests are captured through a centralized interface and routed automatically based on predefined criteria such as scope and approval requirements. This improves visibility, reduces delays, and ensures better coordination across teams.



Renovation Request Workflow



Advantages to the Approach

Enhanced Productivity

Automation reduces time spent on repetitive administrative tasks.

Improved Process Efficiency

Digital workflows streamline request submission, approval routing, and record management.

Greater Transparency

Automated tracking and notifications provide real-time visibility into workflows.

Scalable Solutions

The automation framework supports expansion into additional workflows.

Outcomes: Cost of Care and Operational

Impact Providers and Staff

- Reduced administrative workload
- Faster processing of internal requests
- Improved coordination across teams

Organizational Operations

- Greater visibility into workflows and process status
- Improved governance through standardized processes
- Consistent documentation and record management

Challenges and Considerations

- Change management and user adoption
- Integration across multiple systems
- Ongoing monitoring and maintenance

Lessons Learned

- Early stakeholder involvement improves outcomes
- Clear documentation is essential for effective automation
- Scalable frameworks enable long-term growth
- Strong governance supports sustainability

Advice for Other Organizations

- Identify high-impact, repetitive processes
- Focus on workflows that deliver immediate value
- Leverage existing technology ecosystems
- Invest in training and adoption