

## Retiree Advocacy Organization Saves Days of Labor with AI

### Case Study:

Retired Public Employees Council of Washington  
With Derek VanSpoor, Associate Director

### Departments Impacted:

Accounting

### Objectives:

Implement a system to archive invoices and accounting documents for convenient retrieval without the need for additional infrastructure.



### Meet Retired Public Employees Council of Washington

Retired Public Employees Council (RPEC) of Washington is a legislative advocacy organization dedicated to promoting the interests of state, county, city, and local public sector retirees.

Formed in 1971 and formally incorporated in 1978, RPEC has expanded to include 30 chapters operating in 9 districts and over 13,000 members. RPEC works with other notable outside non-profits who share common interests, such as the Alliance for Retired Americans, the Washinton State Senior Citizens' Lobby, and the Washington Education Association - Retired.

### Challenge

Having been incorporated in the late 70s, Retired Public Employees of Washington had amassed large quantities of accounting documents that were retained in case of need, all in paper form and all at the mercy of the elements.

"We have, probably dating back to the late 70s, bankers' boxes of accounting documents in the basement that have luckily survived all these years," said Derek VanSpoor, Associate Director of the Retired Public Employees Council. "But they are at risk of flood, fire, and theft, so it was essential that we get those digitized as well as a means that we could reference the information within those documents."

In addition to these records, there were several documents that RPEC is required by law to retain indefinitely, taking up usable space.

RPEC also had a relatively time-consuming manual accounts payable process that could be enhanced with digitization.



"Until very recent years, basically all accounts payable invoices went to physical files, and then, after a period of time, they were archived to bankers' boxes and sent down to storage.

*Derek VanSpoor, Associate Director*

“Our current accountant has been scanning the invoices for the past few years, but they weren’t searchable or easy to reference,” explained VanSpoor.

Subject to yearly financial audits, finding the necessary documents was quickly becoming a time-consuming chore for RPEC. After their auditor suggested a document archival system, the organization began looking for a solution.

## Solution

The search for a new solution began for the Retired Public Employees Council before the 2020 pandemic. The organization spoke to several solution providers during the initial bid process, but these solutions all required additional unexpected investments.

At that time, proposed solutions involved additional hardware purchases. “It was required that we had another workstation dedicated solely to the scanning and archival process,” mentioned VanSpoor. “They also suggested a separate scanner, and all the digitized materials would reside on our physical server here in the office.”

The Retired Public Employees Council put the process of finding a new solution on hold during the disruption caused by the COVID-19 pandemic and, upon revisiting it, was immediately impressed by the offerings of Square 9.

“We revisited the process and spoke with Sharp Business Systems and, in turn, Square 9, and we learned about their cloud solution and that our current infrastructure would support everything,” explained VanSpoor. “We didn’t need a dedicated workstation or scanners. We had a multipurpose copier from Sharp that would work adequately for this process, and being cloud-based, it didn’t need server space on our side, which was nice.”

## Benefit

Despite a relatively lengthy implementation process, VanSpoor insists the Square 9 team was

fantastic to work with. “Our UAT has been extended due to other commitments we had here. However, it was seamless and effortless,” said VanSpoor. “The communications back and forth have been outstanding and the responses as well, so it’s been a very painless process.”

The Retired Public Employees Council also took advantage of Square 9’s free online education to prepare its staff for the new solution.

With the project now completed, the biggest benefit to RPEC has been Square 9’s AI-assisted capture platform, TransformAI, which saves tremendous amounts of time archiving past documents.

“In previous proposals, we would have had to go in and design a template, build the template, pull all the AP records for that particular vendor, scan them, and load them into the template process,” explained VanSpoor.



“With GlobalCapture, we can take a stack of payable invoices, run them through the scanner, and import them into GlobalCapture. The AI determines who it is and where it belongs. For staff, this is a great time and expense saver.”



Derek VanSpoor, Associate Director

RPEC’s Square 9 solution will eliminate the bankers’ boxes full of documents in their offices, allowing them to make better use of the space and find documents faster and with significant ease.

“This process is going to free up that space. It’s going to free up that time,” explained VanSpoor. “Our accountant will still scan them and attach them to QuickBooks but then the documents get passed over to GlobalCapture and go into the archive.”

## Result

The Retired Public Employees Council greatly appreciates the solution's ease of use and the short time it takes for task completion. "Tasks can be easily worked into the normal course of activities during the day for the users. It's not a major step away or a big project to undertake to do any of this work," mentioned VanSpoor.

Although, according to VanSpoor, there are no exact metrics yet due to the recency of the project's completion, he estimates significant time savings for the Retired Public Employees Council compared to other solutions.



"With the time we save overall, we're going to end up with hours, if not days, saved over previous solutions that were presented."

*Derek VanSpoor, Associate Director*

For RPEC, however, the most impressive part of this experience was working with the Square 9 staff. "My biggest pleasure has been working with the Square 9 staff and how responsive, informative, and helpful they've been throughout this process," explained VanSpoor. "They check in, see how we're doing, see how the process is going, and are just an absolute pleasure to work with."

When asked if he would recommend Square 9, VanSpoor had this to say: "Absolutely! It's been a painless and effortless solution to our archival needs. It's a time saver versus other solutions. It does not require any additional infrastructure to maintain. Everything that we have in place serves our needs, so that's been outstanding. I would highly recommend it to anyone who asked about a document archival solution."