



COVENANT
VILLAGE

How Covenant Village Turned Three Disconnected AP Systems Into One Connected View

Covenant Village is a nonprofit, full-service life plan community in Gastonia, NC, offering independent living, assisted living, skilled nursing, and memory care. Situated on a quiet, serene campus, Covenant Village offers a range of amenities, activities, and services that support an active lifestyle. Opened in 1982, the community now serves more than 300 residents.

Executive summary

Covenant Village is a full-service life plan community providing independent living, assisted living, skilled nursing, and memory care. Delivering high-quality amenities, services, and activities to more than 300 residents means partnering with a large network of suppliers and service providers and processing hundreds of invoices every month. For years, the lean finance team processed each invoice across three separate systems. This was time-consuming and left the team with limited visibility into the process.

Recently, Covenant Village streamlined its AP process with Ottimate. Invoices are now captured, coded, and approved in Ottimate, and payments are made through the Ottimate's payment feature. Moving away from multiple disconnected systems has saved time, increased capacity for other projects, improved visibility across the AP process, and simplified reconciliation, including surfacing payment discrepancies that used to go unnoticed in a lump-sum bank deposit.

The challenge

Covenant Village offers a range of amenities, activities, and services to help residents live active, fulfilling lives, and it relies on a network of suppliers and service providers to do so. As a result, the finance team must manage hundreds of invoices every month.

For many years, processing a single invoice meant passing it through three separate, disconnected systems. Invoices were uploaded and routed for approval in one platform, posted to MatrixCare, the company's ERP, for bookkeeping, then uploaded to an outsourced payment system.

"If someone had a question about an invoice, I would have to go to three different places to investigate," Jessica Carlyle, the Accounting Specialist at Covenant Village, said.

The process was highly manual, and the software used to approve invoices was particularly frustrating for the finance team.

"It wasn't user-friendly," Carlyle explained. "There were some issues with workflow, and getting them fixed was very complicated and required a programmer."

While the process wasn't ideal, the finance team had found ways to make it work. In fact, according to Cory Sills, the Director of Technology at Covenant Village, the team wasn't looking to switch when they first heard about Ottimate.



850+

Number of invoices processed
on average per month

Founded: 1982

Headquarters: Gastonia, NC

Industry: Senior living

The solution

In 2025, Sills learned about Ottimate while attending the LeadingAge Annual Meeting. Though the company wasn't actively looking to change their process, he signed up for a demo to see what options were available.

"I like to know what's out there," he explained. "I always like to have a backup in case something goes wrong, and we need to switch."

Once he saw the platform in action, it became clear it could help the finance team overcome some of its biggest challenges.

"What stood out to me was how it looked like it was going to simplify a lot of our processes and streamline what we were doing," said Sills. "If it could make Jessica's job easier as the primary person who does accounts payable, then that helps Covenant Village."

After bringing the larger team into the conversation, Covenant Village decided to move forward with Ottimate. During implementation, Carlyle continued processing invoices through Covenant Village's existing system, then uploaded approved invoices into Ottimate. This allowed the platform to learn the organization's vendors and coding patterns prior to launch.

"Once we went live, most of our vendors were already in there, and everything was already pre-coded to go where it needed to go," Carlyle said.

Ottimate's implementation team offered hands-on support to set Covenant Village up for success right from the start. Whenever Carlyle had questions, the team was readily available to walk her through the answers, either by quick email or an impromptu call. "The implementation team was amazing," Carlyle explained. "They were right there the whole time."

Today, Covenant Village manages all invoice coding and approvals in Ottimate before transferring the accounting data into MatrixCare. Once the team verifies everything has been coded correctly, they upload payment information back into Ottimate, where payments are generated through Ottimate's payment feature.

The results

Moving to Ottimate has reduced the time the finance team spends processing invoices. Because Carlyle no longer needs to manually pass every invoice between three different systems, she has more time to focus on work that's been on the back burner.

"There are little projects that we've been needing to do that I've been able to get done now because I'm not spending as much time on the payables," she explained.

Ottimate has also provided the finance team with better visibility across the entire AP process and a documented answer ready any time a vendor, department head, or auditor asks. Previously, if Carlyle got a question about a payment, finding an answer meant searching across three different systems. Today, she can quickly find answers in Ottimate, whether a payment was made by check or virtual card.

"With our other system, I couldn't get an actual copy of the check," Carlyle explained. 'With Ottimate, if someone has a question about an invoice, I can say, 'Here's the check. It's on its way,' and send them a copy.'"

Beyond the finance team, Ottimate has also helped department directors gain visibility and save time. Now, if a director sees an issue on an invoice, they can simply flag it in Ottimate. In the past, they had to chase down Carlyle to discuss and resolve these issues.

"It's so convenient for them to be able to flag and say 'hey, this isn't my department' or 'hey, we shouldn't be paying this,'" she said. "It frees up not only my time, but their time, too."

Switching to Ottimate has also made reconciliation much easier and surfaced problems the old system couldn't. With their previous systems, payments appeared as a lump sum in Covenant Village's bank account, making it difficult to catch a payment error buried inside that total. With Ottimate, each check and ACH payment appears as its own line item, so the finance director can match every payment individually and flag anything that looks off before it becomes a bigger reconciliation problem.

For a lean team processing hundreds of invoices for a busy community, the impact has been simple, yet significant. "It just gives more time back," Carlyle said.

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Filters Placeholder

Invite Vendors to ACH Upgrade to Same-Day ACH

Unpaid Invoices 111 Your Approval 11 All Pending Approvals 11 Scheduled Payments 11 Pending Export 11 On Hold 11 Calendar All Payments

Overdue Invoices 11 Total Unpaid Invoices 11 **Locations with Unpaid Invoices 111** Upcoming Invoices 11

LOCATIONS ↑↓	INVOICES ↑↓	TOTAL ↑↓	INVOICE DATE ↑↓	DUE DATE ↑↓	SCHEDULED DATE
☐ HD Supply Unmapped Vendor	54655	\$45.00	Oct 2, 2026	Oct 9, 2026	Schedule Payment
☐ Direct Supply Mapped Vendor	55102	\$1,284.32	Oct 3, 2026	Oct 15, 2026	Schedule Payment
☐ Stryker Unmapped Vendor	54891	\$312.75	Oct 1, 2026	Oct 9, 2026	Schedule Payment
☐ Stericycle Mapped Vendor	55019	\$2,940.10	Sep 29, 2026	Oct 12, 2026	Schedule Payment
☐ Staples Unmapped Vendor	54732	\$875.00	Oct 2, 2026	Oct 13, 2026	Schedule Payment
☐ McKesson Medical-Surgical Mapped Vendor	54967	\$618.44	Sep 30, 2026	Oct 8, 2026	Schedule Payment
☐ The Home Depot Unmapped Vendor	54810	\$150.00	Oct 1, 2026	Oct 9, 2026	Schedule Payment
☐ Airgas Unmapped Vendor	55203	\$429.60	Oct 3, 2026	Oct 11, 2026	Schedule Payment

Ready to transform your AP processes?

To see Ottimate in action,
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