



Client Success

Westminster Village

Market

Senior Living

Portfolio

1 life plan community

Client Since

2021

Highlighted Products

[Yardi Payment Processing](#)

[Yardi EHR](#)

[RentCafe Senior CRM](#)

[RentCafe Senior Living Portal](#)

[Yardi Voyager Senior Housing](#)

The Benefits

Westminster Village drives efficiency, empowers staff and boosts resident satisfaction with the Yardi Senior Living Suite.

About Westminster Village

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“ Having our CRM, Voyager and EHR systems all in sync with the same data eliminates manual entry which is time wasted and error-prone. ”

Dan Poteet, Chief Information Officer, Westminster Village

The Company

Westminster Village is Scottsdale's premier non-profit Life Plan community. Located in Scottsdale, Arizona, it was founded in 1988 by a group of friends and neighbors who envisioned a community where people could continue their accustomed lifestyles and be assured of lifelong health care. Their idea was to assure dignity and independent living for people in their later years.

The Challenge

Before partnering with Yardi, Westminster Village was operating using siloed solutions and manual processes. That combination was time-consuming and susceptible to errors, which prevented staff from working as efficiently as possible. Westminster leaders sought a single connected solution to streamline workflows at every level — and enhance resident satisfaction.

The Solution

Yardi Senior Living Suite

The Yardi Senior Living Suite combines resident care, marketing, sales, finance, business intelligence, operations and more on a cloud-hosted, HIPAA and SOX compliant software platform. Mobile, intuitive and efficient, the Yardi Senior Living Suite has everything you need to manage your communities and drive growth.

The Story

Thriving With An Integrated Solution

Before Yardi, Westminster lacked a single technology solution built to unify senior housing operations in one secure place. Leaders knew the power of an integrated solution and the benefits it would bring, which led them to the Yardi Senior Living Suite. Now, Westminster has one centralized system that offers everything it needs.

“This is a major improvement over having disparate systems not connected to each other,” explained Dan Poteet, chief information officer at Westminster Village.

Gaining a single connected solution meant Westminster could leave manual processes in the past, such as hand-keying data. The Yardi Senior Living Suite updates every piece of information in real time — from financials to care — ensuring accuracy and helping teams



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quickly access what they need.

“Having our CRM, Voyager and EHR systems all in sync with the same data eliminates manual entry which is time wasted and error-prone,” said Poteet. “It is also convenient from an IT perspective since we only have to use one system for access control.”

Driving Efficiency

With disparate systems behind them, teams at Westminster can focus on driving efficiency — not spending hours on error-prone processes.

With RentCafe Senior CRM automating workflows, sales and marketing teams are equipped to work productively, stay informed and track leads with ease. “Having the ability to keep track of prospect touches and having auto-generated follow-up tasks has helped our marketing team stay better connected with prospects and the sales cycle,” shared Poteet.

On the care side, Westminster saves time and reduces errors using Yardi EHR, since all resident data automatically flows over from Yardi Voyager Senior Housing. “Being able to do our home health billing and having it connected to Voyager is the most valuable feature,” said Poteet. “It reduces manual entry of the same information, and reduces time and errors in the process.”

The full-service EHR solution allows Westminster’s staff to complete important tasks — and access real-time health information — directly in the platform, right at the point of care. “Staff can now use a smart device when in a resident’s apartment rather than writing down notes and adding them later, which drives efficiency,” explained Poteet.

With RentCafe Senior Living Portal and Yardi Payment Processing, residents and families access the convenience of online payments — which helps Westminster’s accounting team on the processing side. “Online payments is one convenience we didn’t have before,” said Poteet. “Giving the resident and their family the ability to pay online and set up automatic payments has reduced the time accounting has to manually enter checks, and gives the convenience of self-reliability.”

Enhancing Satisfaction

Of course, Westminster’s top priority is ensuring residents are cared for, connected to



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their loved ones and pleased with the community's services. The organization finds that with Yardi, offering everything residents and families need — and raising satisfaction — is easier than ever.

RentCafe Senior Living Portal keeps residents, families and staff connected by displaying real-time updates relating to care, community activities and more. "The resident portal allows us to communicate and provide information to our residents and their families quickly and conveniently," shared Poteet.

That improved communication has been well received across the community, and it's one of many benefits the secure online portal brings. "Residents and their families have given us positive feedback about online payments, the activities calendar and the ability to get community information on their own," explained Poteet. Online payments in particular has raised satisfaction among residents and family members — "those that have adopted the online method, love it," added Poteet.

Westminster Village has also implemented [Yardi Senior IQ](#), [Yardi Bill Pay](#), [CHECKscan](#), [RentCafe Wellness](#), [Yardi Advanced Budgeting & Forecasting](#)

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