"Transform Filer efficiently manages our case filing and allows us to share case file information in addition to distributing documents electronically— internally and externally—to help thin large, paper-based files. This eases the pressure of needing additional off-site storage."

– Jim Boyd
    Information Technology Manager
    Adams County Human Services

How Adams County Increased Worker Mobility by Streamlining their Filing Process

Company Profile

Customer: Adams County Co; Department of Human Services

Industry: State Government

Solutions Utilized: Transform® Filer and Microsoft SharePoint®

Business Overview: Adams County Human Services (ACHS) provides social services programs with integrity and innovation to the residents of Colorado. In partnership with the community, state and federal entities, ACHS serves in the spirit of being good stewards of public funds while promoting the dignity and betterment of individuals and families.

Case Study Highlights

- Adams County Human Services employees saved up to 6 hours of filing paperwork every two weeks.

- ACHS didn't have to invest in more space just to store old documents.

- Transform Filer eliminated case files that were three or four inches thick.

Challenge

Social workers at Adams County Human Services (ACHS) are responsible for processing more than 140 paper document types per case which creates stacks of case records that could easily grow three to four inches thick. Adams County typically retains these documents from 5 to 17 years—and in some cases permanently. That's why they needed to implement a robust solution that would allow them to keep those documents for any length of time.

Storage was also a big issue for Adams County because they anticipated a move to a new government center and didn't want to invest in additional space just to store paper records. ACHS quickly identified a need to start electronically filing documents because they were facing the following issues:

- **Efficiency.** Many workers had to spend an entire day filing paperwork every two weeks. Filing and retrieving paperwork was a cumbersome process that took valuable staff time away from clients.

- **Mobility.** Workers had to have paper documents in their possession to do their job. This inconvenience resulted in workers constantly having to travel back and forth from their desk to the filing cabinet.

- **Fees.** ACHS had to pay couriers to transport documents to other ACHS offices for continued processing.

- **Paper Storage.** Future building plans would require extra storage space just for paper documents.

Solution

After observing and reviewing the inefficient process at ACHS, Bottomline Technologies was able to easily implement an integrated system that utilized both new and existing software. The solution combined Bottomline Technologies' Transform Filer with ACHS' existing case management and SharePoint systems to achieve a successful document management system.

At ACHS, a processor receives paper documents, updates their case management system, places a barcode on each document, and stacks the paper for later retrieval by IT for batch scanning. Transform Filer indexes each of these documents in SharePoint by communicating with the case management system for easy search and retrieval.

Transform Filer offered ACHS the ability to quickly enable indexing at the desktop level, where it occurs as part of a normal business process. In addition, Transform Filer allows employees to quickly search for documents from within their familiar case management screens. The addition of Transform Filer at ACHS has enhanced their user experience by quickly eliminating their paper problem as well as duplicate data entries.

Results

Transform Filer enabled ACHS to streamline the indexing and scanning of their paper documents, all while saving time and money. Built on SharePoint, Transform Filer features an easy-to-understand, point-and-click administrator interface designed for office workers rather than IT professionals. Now, ACHS employees can index files with a single key stroke using data from their case management system and then route them to the scanning department for archiving. Once the files are scanned, they're saved in SharePoint's secure database for easy retrieval through a virtual filing cabinet.

Transform Filer provides a cost-effective way to image case files, share case file information, distribute case documents electronically—internally and externally—and reduce large, paper-based case files. The estimated labor costs associated with the centralized indexing, scanning, verification, and storage of case documents were excessive for ACHS—until they started using Transform Filer.
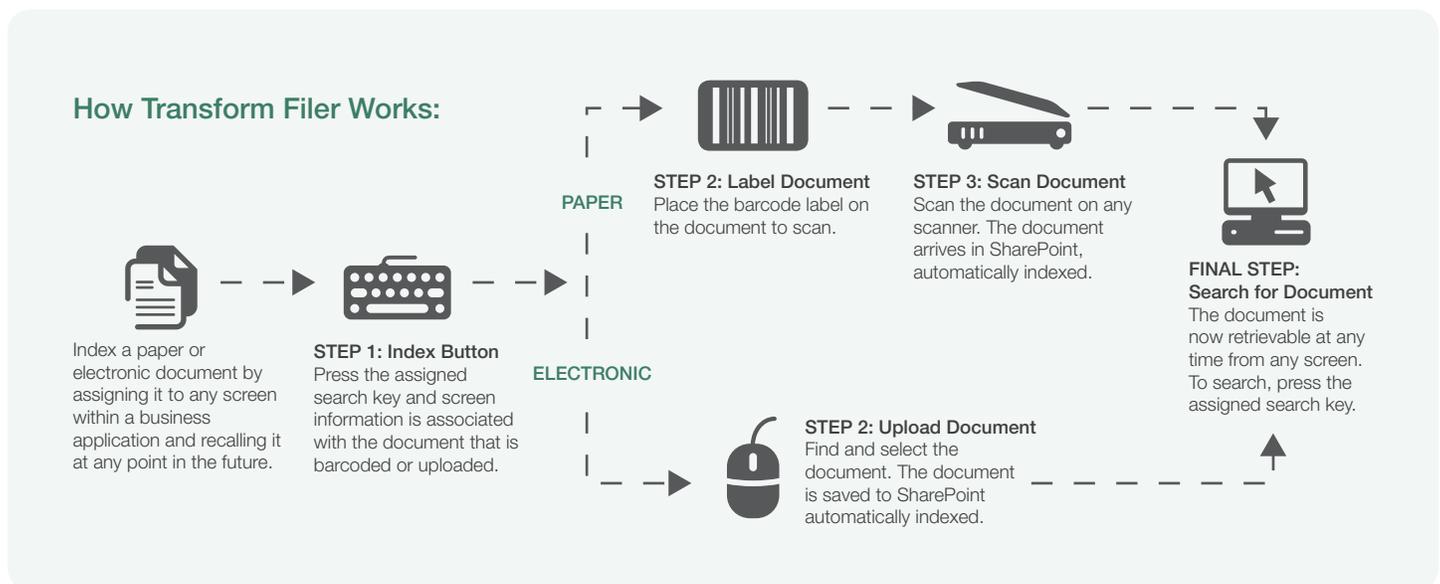
Transform Filer does not require any programming or plug-ins, allowing business users to configure the solution in minutes. Since the new system was implemented, ACHS has seen tremendous improvements in productivity and workflow, especially in the following areas:

- **Efficiency.** Now, ACHS workers only spend two hours every two weeks handling paper. This process saves the average worker 156 hours of filing per year. Filing and retrieving is quick and convenient—saving workers, attorneys, and technicians more time than ever before.

- **Mobility.** Workers can access encrypted files from their computer and they can get their job done at any location with the information they need.

- **Fees.** Transform Filer has given ACHS workers the ability to access files on the go, which means no more expensive courier fees.

- **Paper Storage.** No additional storage space was required to store paper documents.

About Bottomline

For more than 20 years, Bottomline has been focused on software applications that optimize document-driven processes. As a result, Bottomline possesses both the proven solutions and the tested domain expertise to deliver consistent customer value and significant return on investment.

A leader in payment, document and invoice automation, Bottomline's solutions have been successfully installed for more than 10,000 corporations, financial institutions and healthcare organizations around the globe.

How Transform Filer Works:

Index a paper or electronic document by assigning it to any screen within a business application and recalling it at any point in the future.

STEP 1: Index Button
Press the assigned search key and screen information is associated with the document that is barcoded or uploaded.

PAPER

STEP 2: Label Document
Place the barcode label on the document to scan.

STEP 3: Scan Document
Scan the document on any scanner. The document arrives in SharePoint, automatically indexed.

FINAL STEP:
Search for Document
The document is now retrievable at any time from any screen. To search, press the assigned search key.

ELECTRONIC

STEP 2: Upload Document
Find and select the document. The document is saved to SharePoint automatically indexed.

www.Bottomline.com