Laserfiche ECM Blogs

Standardization Strategy

Written by Meghann Wooster

With 265,000 residents, Durham County is home to the famed Research Triangle Park, one of the most prominent high-tech R&D centers in the world. As such, the county's IT Department has quite the legacy to live up to.

"Technical innovation and efficiency are important to our citizens," says Steve Barden, Systems Development Supervisor for Durham County, "and they're a top priority for the IT Department as well."

Over the past year and a half, one of the major strategic projects for Durham County's IT Department has been upgrading and standardizing its enterprise content management (ECM) infrastructure. "In the past, ECM was viewed as a departmental application," explains Barden. "We came to realize, however, that this is an inefficient and resource-intensive approach, so I stepped in as project manager to coordinate the various installations and get everyone on the same page."

With Laserfiche already in place in four county departments, the choice of systems upon which to standardize was simple.

"We have 32 different departments across the county," says Barden. "DSS, HR, Public Health and Legal were already using Laserfiche, so it made sense to stick with the system they were already familiar with. It was more a question of getting them all onto the same version of Laserfiche before rolling it out to additional departments like IT and Purchasing."

Laserfiche Rio, with its unlimited servers and ability to give IT central control over the system while still allowing each department to customize it to their own unique needs, made the most sense from an enterprise standpoint. Today, Durham County has a 605-user Rio system, along with Quick Fields and Laserfiche Records Management Edition.

In the Beginning

Durham County's first purchase of Laserfiche occurred back in 2006, when DSS decided that case management would be easier if files could be saved in an electronic, rather than a paper, format. To date, DSS has scanned and stored the following records in Laserfiche:

- Case files.
- Food & Nutrition Services.
- Child Welfare.

In addition, it's currently about halfway through the conversion of its Medicaid records. "DSS will be moving into the county's new Human Services Building at the end of 2012, and our goal is to be completely paperless by then," explains Sharon Hirsch, Assistant Director of Customer Accountability for Durham County's DSS Department. "It'll make the move a lot easier," she adds, "and there's also no room in the new building for document storage, so that's extra incentive to make sure all our records are accessible on the desktop."

In fact, accessibility is Hirsch's favorite thing about Laserfiche. "In the past, staff members had to request paper records from the Records Management team, and it sometimes took them a few days to deliver the requested documentation. Today, our staff has immediate, point-and-click access to the records they need. It's a huge time saver."

Hirsch also notes that it's easier for supervisors to review active case files thanks to Laserfiche. "Active files used to be locked up in file cabinets by individual case workers. Laserfiche gives the supervisors greater visibility into work as it's being done, so they're able to correct any errors or oversights earlier in the process."

Seeing the success DSS was having with Laserfiche, the HR, Public Health and Legal Departments soon implemented the system for themselves.

Branching Out

…into Legal

According to Nina Bullock, Administrative Assistant to the County Attorney, the Legal Department was tired of making multiple copies of documents like medical records and transcripts, which could number thousands of pages. "It was a constant strain on both material and staff resources," she says.

The Laserfiche implementation has been particularly useful for the Legal Department in regard to document duplication and distribution. "Instead of copying and couriering documents to interested parties, we're now able to e-mail them or send the documents on a CD."

Additionally, the county's lawyers no longer have to drag boxes of paper into court. Instead, they simply bring their laptops and access documents through Laserfiche. "Because staff no longer has to transport heavy files to court or move heavy boxes to

retrieve closed files, the risk for injuries, particularly back injuries, has been greatly reduced," says Bullock. "Back injuries are the most expensive costs for the Risk Management Division's Workers' Compensation claims. Changing the way the county works in this manner is setting a precedent that will potentially mitigate Workers' Compensation claims by millions in the next few years."

Other cost savings, she explains, have been substantial as well. "From fiscal 2007–2008, our expenditures on paper, toner cartridges, printer replacements and other related costs have decreased by 59% as a result of implementing Laserfiche. As our process becomes more streamlined and court systems become more technologically equipped to receive case filings electronically, we anticipate that these costs will decrease even more.

"So far," she adds, "these savings have allowed us to avoid cutting staff for two years in a row!"

In addition, Bullock notes that use of Laserfiche has saved the Legal Department's support staff approximately 10–15 hours per week, totaling roughly 3,500 hours a year. In particular, she appreciates that staff no longer has to spend days painstakingly stamping Bates Numbering onto each page of an evidentiary document; instead, Quick Fields does it automatically.

She explains, "With Laserfiche, our work product is better and our volume is higher, because the time we save on repetitive, manual tasks has been redirected to more substantive aspects of our jobs."

Bullock believes that the benefits of Laserfiche—including lower costs, higher staff efficiency and increased confidentiality of client information—will continue to improve the department's performance for years to come.

…into Public Health

For the Public Health Department, eliminating the need for document storage has driven the adoption of Laserfiche. "In February 2011, the department is moving into the county's new Human Services Building, where there's no space to store medical records," explains Marcia Robinson, Local Public Health Administrator for Durham County.

"Prior to Laserfiche," she adds, "we were storing current records in a 10'4" x 16'9" room, and we were archiving old records offsite with Iron Mountain. The process of finding, copying and filing records was both expensive and time intensive."

Although the department has saved a significant amount of money on charts, labels, paper, document storage and toner, the real benefit has been the boost in customer service. According to Robinson, "Our medical records clerk no longer has to spend hours making copies to respond to requests from clinicians, practitioners, lawyers and other providers. She now has the option to e-mail the information directly from Laserfiche, eliminating backlogs and providing much more up-to-date files than she could when we were using paper records."

She continues, "With Laserfiche, staff saves roughly 15 minutes per client during the registration process, reducing wait time and increasing our clinicians' ability to serve more clients. Laserfiche also prevents many lost staff hours spent on chart preparation, along with the frustrations of searching for misfiled, misplaced and misnumbered charts."

Overall, Robinson believes that Laserfiche is crucial to the department's ability to respond efficiently and effectively to the needs of its clients. "In this time of budget constraints," she says, "our investment in Laserfiche has paid great dividends."

Overcoming the Limits of a Departmental Approach

Although these departments were all realizing great benefits from their use of Laserfiche, the lack of an enterprise approach to ECM was a problem.

Barden explains that there were two different resellers managing four separate Laserfiche deployments within Durham County. "Each department had a lot of flexibility to use the system as they saw fit," he says, "but the IT Department didn't have a lot of control over what was going on."

For example, there was one repository on a drive that was never backed up, and a number of indexes that weren't being backed up, either. In addition, Barden discovered that DSS had been scanning documents without using OCR, which made it difficult to find information contained in the repository. "When the IT Department doesn't have central control over an organization's ECM system, you run the risk of losing important information and other similar problems."

Barden notes that the implementation hasn't been without its flaws, but credits One Source Document Solutions, Durham County's Laserfiche reseller, with being available to assist with any issues that arise.

"Although people aren't always thrilled to let go of their paper," he says, "in the long term we know that standardizing on Laserfiche is going to help the entire organization be more sustainable, more efficient and more available to our citizens. I had no idea

what I was getting into when this project started, but it's been gratifying to play a role in transforming the way the county does business."

Meghann Wooster is a senior writer at Laserfiche, helping information management and IT professionals optimize their use of enterprise content management (ECM) software. Follow her on twitter at @LFMeghann