

# Better, Faster Public Service

*Social services applicants get shorter wait times and quicker appointments thanks to the county's use of OnBase for enterprise content management (ECM).*

**S**ocial services work has always been a very manual process, with mountains of paper being handled by case workers. Citizens seeking assistance must fill out applications and also provide documents regarding housing, income, expenses, need — the list goes on and on.

Case workers have traditionally spent much time filling out, copying, mailing, and waiting for a huge variety of documents. With so much paper involved, the social services environment is the perfect place to streamline processes with enterprise content management (ECM).

ECM software combines the integrated electronic management of content, business processes and historical records in a single application for an entire enterprise. Once documents are scanned or entered into the ECM system, they can be viewed and shared quickly and easily, with no need for printing, copying or waiting.

Lucas County, Ohio, put a lot of effort into finding its ECM solution and decided on OnBase, a Hyland Software solution. OnBase provides numerous features Lucas County was seeking: enterprise-wide capabilities, open architecture, Web-based capacity, strong security, out-of-the-box opportunities, and the ability for employees to use the same applications they've always used instead of needing to learn new software.

With OnBase, Lucas County improved its systems for social services work and numerous departments. The county is using OnBase in 18 of its 38 departments, with plans to expand it into others. It's also sharing OnBase with the city of Toledo and Toledo Public Schools.

## Streamlined Processes

Two of the county's biggest users work within social services: the Clerk of Courts and the Department of Job and Family Services (JFS). Huge amounts of paperwork come into those departments.

Now documents are scanned into the system as soon as people walk into the lobby. By the time an applicant sits down with a case worker, that worker usually has everything he or she needs, and can quickly retrieve any additional documents if necessary.

For applicants who self-register at a kiosk in the lobby when they arrive for an appointment, the process is even more streamlined. That's because the county integrated OnBase with Compass Software, from Northwoods Consulting Partners in Dublin, Ohio.

Compass assists in the client flow process for human services, automatically managing appointments and even balancing the assignment of appointments among case workers.

When an applicant self-registers at the kiosk, Compass notifies the case worker and prints a receipt for the applicant's records. All this occurs while the applicant normally would have been waiting in line. Case workers can then provide better and faster service to applicants during their visits.

"The implementation of an agency-wide document imaging solution along with standardized OnBase workflow processes has transformed the human service environment by leaps and bounds," said Mario J. Faz, information services director of JFS. "In the past, large case loads for eligibility caseworkers have always been problematic and hard to manage. This translates to increased paperwork flowing throughout the agency. Employees were swimming in paper. We now have a solution that can manage 400,000 pieces of paper per month being scanned and indexed. All this data is now at the fingertips of the employee. It's amazing to see the positive change this system has had for the agency."

Information Services Director Mario J. Faz checks the workflow for the Lucas County, Ohio, Department of Job and Family Services.

Photos by George Sydlowski



Self-service kiosk and (left to right) Records Manager Kevin F. Callaghan, Clerk of Courts J. Bernie Quilter, Director of Department of Job and Family Services (JFS) Deb Ortiz-Flores, and JFS Information Services Director Mario J. Faz.



Dual monitors let case workers and applicants see the same documents, speeding up appointments.



## Better Service and Lower Costs Give Citizens More

Waiting times for the public have dropped from 40-60 minutes to 10-15 minutes, thanks to documents moving through the system electronically instead of manually. And when it comes to helping applicants for Temporary Assistance for Needy Families, for example, case workers can find needed documents instantly instead of waiting one or two days for a file to arrive from the central storage facility.

A dual-monitor system allows the case worker and the applicant to see the same documents simultaneously. The applicant can see what the case worker is typing. E-signatures are used, so signed documents don't need to be printed and copied. The result is a quicker, more efficient appointment.

Integration with eCAF, the electronic Common Application Form required for nearly all JFS clients, is also smoother. Reviewing and verifying documents is much faster, and eCAF documentation can be shared with other agencies much more easily.

Kevin F. Callaghan, records manager of the Clerk of Courts, said OnBase is working very well for both the county and the case workers. "They love the way they're able to pull up the files when they need to, and they're able to serve their clients much better," he said. "So we've had a reduction in costs, and an increase in service. I think that's a huge success story." With lower costs, the county can re-allocate funds to other important activities.

## Enterprise-wide, Web-based, Open Architecture: The Right Solution

In Lucas County, documents can be shared with other departments, other counties, the state and the public. OnBase also helps the county set up optimum work processes and fine-tune those over time.

Lucas County chose OnBase for numerous reasons. First, it wanted a truly enterprise-wide solution that allows easy document-sharing across departmental lines. Second, it wanted open architecture for increased flexibility with collaboration and maintenance. The county sought a Web-based approach, for easy maintenance of computers residing within dozens of agencies.

The county was also impressed with the security features, which keep sensitive data safe yet still allow access for specific people or agencies when needed. OnBase's redaction capabilities were also an important factor for the county. The county also needed maximum ability for out-of-the-box usage, with little

customization. It's a long list, but the county found everything it needed with OnBase.

The county's enterprise-wide approach has led to numerous cost reductions. When it was discovered that nine departments were planning to buy their own imaging systems, the county saved money by consolidating the effort. If separate systems had been purchased, the county would have spent around \$5 million. By getting one system for all departments to share, the county spent approximately \$750,000.

With less need for paper, much money has been saved on storage space. The county destroyed 5,469 boxes of paper records, and no longer needs a building it had been using to store paper documents. OnBase allows the county to be more efficient on storage while still complying with document retention requirements.

## More Scanning, Less Cost

Working across departmental lines inspired county leaders to create the Imaging Advisory Group (IAG). The group fosters clear communication among departments. "If we did not communicate with each other, we would get on a path of taking two steps forward and one step back," said J. Bernie Quilter, clerk of courts and leader of the IAG. "I had to ensure we consolidated and increased efficiency to contain costs across the county."

By working with Lott Industries, an employer of people with developmental disabilities, the county finds significant savings in document scanning. The typical providers would have cost 9-15 cents per image. By working with Lott Industries, the county scans images for around 6 cents per image.

"Our partnership with Lott Industries has far exceeded our initial hopes for success," said Quilter. The county has scanned 11 million images in the last two years. The project has been so efficient the county plans to add even more personnel for scanning.

The county is also working on integrating OnBase with its GIS. That will allow JFS and other agencies to have increased access to information. For example, JFS, the courts and the Board of Elections could all quickly verify whether a given address is indeed an actual address. It's another example of ECM allowing more departments to share information quickly and easily.

The future looks bright for even more efficient uses of OnBase in Lucas County. The county will continue to seek new ways to leverage its comprehensive ECM. That's good news for case workers, numerous county departments and the public.



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[www.onbase.com/government](http://www.onbase.com/government)