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Sahid Khan
IT Manager
CCIS-North of Philadelphia County

Case Study

Child Care Information Services

Social services agency gains control of client records with hosted service.

Client Profile

Headquarters: Philadelphia, PA

Industry: Social Services

Child Care Information Services - North, of Philadelphia County (CCIS-North) provides childcare information services to the public and, under contract from the state, administers childcare subsidies for eligible families. The agency maintains information on local child care facilities and community resources to provide unbiased information to assist families in making informed child care choices.

FileTrail Implementation: 2005

FileTrail Products Implemented

- **FileTrail Hosted Professional** - On-demand service for file tracking and records management.
- **FTColorLabel** - On-demand printing of color-coded folder labels.
- **FTPPortable™** - Low-cost portable scanner for file tracking and auditing.

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Background

When Charles S. Carr assumed the directorship of CCIS-North of Philadelphia County, his focus quickly settled on increasing worker productivity, containing costs, and securing client information. Records administration was immediately seen as an area in which automation could accomplish all three goals.

Filing practices in the office had evolved over the years as the number of staff and caseload grew. Manual processes were wasting labor, allowing creation of duplicate files, and making it impossible to monitor compliance to the State of Pennsylvania regulations.

Sahid Khan, IT Manager for CCIS-North, was tasked to find a business solution. FileTrail was selected to solve the agency's manual filing problems after thorough research and formal presentations from several vendors. FileTrail was selected primarily because of its ease of use, ability to configure formal practices, and the availability of a hosted service with a low upfront cost.

Saving Labor

Prior to using FileTrail, a great deal of time was spent finding files. When a file was needed, staff would walk to the file room. If the file wasn't there, a desk-to-desk search would begin, often ending in an email blast to the entire office.

Today, all staff have access to search and locate files through FileTrail without leaving their desks. This capability has eliminated manual searches for files and saved a great deal of time.

“Our staff doesn't spend time chasing files around and are focused on productive work,” said Sahid Khan, IT Manager. “We have seen a dramatic increase in caseworker productivity within the first few months of using FileTrail.”

Eliminating Duplication

Another benefit of FileTrail is that people really know if a file exists or not. Before implementing FileTrail, you never really knew if a file had been created for a case or not. Frequently, when no file could be found a new one was created, resulting in many duplicate files.

“The duplicate files were wasting our time,” said Shirley Vance, Office Manager and back-up Records Administrator. “The worst part was that you had no way to know if you were holding all the paperwork for a case, or if there were others drifting around with important documents.”

Application Highlights

- The OnDemand service is hosted on FileTrail's servers, eliminating capital expense in implementing a solution.
- FileTrail keeps track of case files, vendor files, and fiscal files for thousands of active cases and is actively used by 75 staff members.

Key Results

- **Save Labor:** FileTrail saves labor by eliminating lost files and automating manual tasks.
- **Prevent Duplication:** FileTrail prevents duplication of files by making it easy to see what exists and by issuing a warning if users try to create a duplicate file.
- **Formalize Practices:** FileTrail provides structure to processes involving handling and processing files.
- **Promote Compliance:** FileTrail keeps audit trails and controls access to critical records, while increasing staff accountability for files.

Customer Insight

Customization has been the biggest benefit to us. We knew we would be able to describe our case files, provider files, and fiscal files with the data fields appropriate to each. But, we also added our own status fields to automate compliance reporting to the state.

Cost and timing were critical. Every alternative required a large initial expense for software. With FileTrail's hosted service we pay a monthly fee that comes out of our operating budget. This allowed us to get a solution to our critical problems now, rather than submitting a business case and hoping the money would be available next year.

About FileTrail

FileTrail, Inc., is the leading provider of browser-based records management solutions. Companies of all sizes turn to FileTrail to streamline processes with the latest technology and most configurable software. Headquartered in San Jose, California, FileTrail has been providing solutions for records management since 2001.

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Leveraging Web Technology

CCIS-North benefits from FileTrail's pure web technology. The interface is immediately familiar to any person who has used the internet at home. Processes are clear and work the way that people expect them to.

"I was most surprised by the simplicity of FileTrail," said Khan. "Any new hire can sit down and be comfortably using FileTrail in 20 minutes."

Formalizing Practices

The FileTrail software helped CCIS-North implement formal practices. Structured processes and tools in the application guide staff through efficient file handling processes step-by-step.

Some of the processes have had powerful results. CCIS-North implemented the Time Limits feature as a way of modifying undesirable behavior.

"It was common for case workers to procrastinate making updates to notes in the case files," according to Khan. "Several days of delay only resulted in files getting piled up at desks and being difficult to find and access by others."

Time Limits and the email notification are powerful tools for proactively managing the work process. As a result, fewer files are checked out for shorter periods of time, which translates to better control over files and improved and prompt service to the clients.

Increasing Accountability

One of the tools that CCIS-North relies on is the FileTrail Mini. The Mini is a palm-sized portable bar code scanner that helps staff conduct desk audits. The Audit Discrepancy Report that results helps identify who is and is not adopting the new filing practices.

"The best way to raise accountability is to conduct some desk audits during business hours," said Khan. "The beeping of the scanner gets attention and the high visibility raises everyone's accountability in handling files."



The Mini provides convenient portable bar code scanning at a low cost.

Happy Conclusion

FileTrail addressed the problems initially identified by CCIS-North. In addition, FileTrail has provided some great tools for enforcing and reporting compliance with State regulations.

"FileTrail has been an amazing change for our agency," said Khan. "I paused the other day and wondered how we got through all this before FileTrail."

Contact FileTrail Today!

For more information about the benefits of automating with FileTrail, contact your local FileTrail representative at:

FileTrail, Inc.

111 N. Market Street, Suite 715
San Jose, CA 95113-1108

Telephone: 800-310-0314
Website: www.filetrail.com