



Efficiency through automation

Idaho state agency's paperwork had spread over 34 sites

Chartered to assist Idaho residents who have disabilities, the Idaho Department of Vocational Rehabilitation (IDVR) is a state- and federally funded agency that helps people prepare to secure, retain, or regain employment.

Program participants face significant obstacles that obstruct daily living, including disabilities, post-traumatic and other stress disorders, and coping deficiencies. IDVR provides necessary medical, educational, and psychological services to help them to become productive citizens and lead satisfying lives.

Since IDVR reports to national and state authorities, thorough case documentation ensures the right services are provided and the division is reimbursed. Participants and service providers are scattered statewide, complicating information access and sometimes leading to costly delays in providing service.

Paper, paper everywhere

The paperwork is complicated. Some of the 9,000 participants have multiple cases, stemming from previous medical challenges or unsuccessful work placements. Files hold detailed documentation, including referrals, evaluations, requests for services, medical diagnostics, educational retraining, certification paperwork, and more. Federal regulations require documents to be kept at least five years. Tracking is time-consuming and costly.

Before automation, IDVR's documentation was widely dispersed. Service providers were scattered across 34 sites, including schools, prisons, and other facilities, making file

access inefficient. Ensuring pages weren't lost, waylaid, or misfiled was challenging.

Ready for change

Recognizing the wisdom in transitioning to electronic storage and processing, IDVR's director of field services hired Bob Nertney as IT resources manager to lead the charge. The goals were to address:

- Inefficient file access.
- Document security concerns.
- Difficulty proving field worker compliance.
- Funds wasted on travel to retrieve files.

Finding a solution

IDVR needed to integrate Alliance Enterprise Software's AWARE patient tracking system with electronic document management software to ensure accessibility and security of case information so files could be digitally identified, gathered, and packaged for secure viewing and processing. After seeing Optical Image Technology's browser-based DocFinity software at a similar agency and studying the ROI, IDVR decided to implement DocFinity.

Readying staff for change

Employees were accustomed to faxing, mailing, and transporting up to 300 pages of documentation per patient whenever workers or auditors needed information. To accelerate the conversion, management hired temporary staff for scanning and shredding.

Nertney says he trained full-time staff on accessing, retrieving, and working with imaged files so they would immediately see the value. Initially 6,000 case files were scanned, equal to more than a million pages. Now authorized workers can complete participant files, request services, and manage cases directly from their desktops, wherever they are.

Results

Although the pilot implementation isn't yet statewide, the division has drastically reduced costly waste of searching for, faxing, mailing, and transporting documents. The staff works more efficiently, knowing:

- Only authorized persons can view sensitive files.
- Files are found instantly whenever they're needed.
- Compliance is regulated consistently through software configuration and easily proved on demand.
- Case information is available at the click of a mouse, enabling informed decision-making.
- More time can be allocated to helping participants rather than searching for information needed to make judicious decisions about their services.

Envisioning the future

Serving program participants efficiently and complying with regulations is just the beginning for IDVR. The potential for gaining efficiency is widespread. Human resources and finance are next, with the goal of eventually imaging documents agency-wide.

By setting clear goals, creating a strong plan, encouraging employee collaboration, and choosing the right technology partner to address its needs, IDVR has revolutionized service to constituents while reducing costs and facilitating compliance. ●

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