

Accelerating Government Processes to the Speed of Now:

Workflow Optimization and Automation

What is workflow optimization and automation?

Today's constituents expect two things of state and local government agencies: speed and efficiency. Accustomed to instant Internet transactions from the private sector, they expect that from government, too.

Unfortunately, most government processes — the sequence of tasks that must be completed to finish a project, job or delivery of services — are still based on paradigms involving manual labor, paper documents and the physical movement of those documents from one location to another. These processes, or workflows, are slowed by paper and can add hours, days or even weeks to tasks that could be handled in minutes if the inefficiencies were removed. Often these processes and tasks have not been changed because agencies are working too hard to cope with their day-to-day responsibilities to stop and analyze areas for improvement.

Workflow optimization analyzes tasks in great detail to find the most efficient ways to do them with modern technology. Although the human element is never forgotten or overlooked, workflow automation takes over routine, repetitious tasks that really don't need human attention. Not only does this eliminate unnecessary human intervention, but it also frees up precious staff resources for far more important tasks than finding documents in filing cabinets — or looking for them when they've been misfiled.

Workflow optimization and automation first dramatically improve the way normal government work is done and then accelerate that work to the speed of now.

Why now?

State and local governments have fewer resources, and constituents are experiencing greater difficulties and calling on their state and local governments for more services than ever before.

- Although American Recovery and Reinvestment Act funds aided state and local governments during the recession that began in late 2008, those funds are largely spent now that 2010 is winding down.
- A survey jointly conducted in mid-2010 by the National League of Cities, the United States Conference of Mayors and the National Association of Counties found that, from 2010 through 2012, local governments are expected to lose nearly 500,000 jobs.
- Even with American Recovery and Reinvestment Act funds, state and local governments face tremendous shortfalls in revenue as tax proceeds from property, income and sales taxes plummet due to the collapse in property values, continuing high levels of unemployment and an unwillingness to spend on the part of jobless constituents.
- At the same time, those governments are also facing severe budget constraints that reduce the available staff resources through such measures as furloughs or lay-offs.

Why is it important?

Regardless of the economy, the mission of state and local governments to serve their constituents has not abated. Their ability to do so has greatly diminished, causing great distress.

If ever a solution that allowed government employees to do more in less time was needed, now is that time. With workflow optimization and automation, every work process can be examined and evaluated to not only speed it up, but also to make it more effective.

For example, consider an application for social services that includes the necessary verification paperwork. Such an application must be reviewed, approved and verified by the government personnel with the appropriate authority, and perhaps, more than one review and approval is necessary. Some of the steps in this process may overlap or duplicate each other.

But what happens to this package of paper as it travels through the system? Perhaps it gets misfiled along the way. Perhaps one of the verification documents gets lost. Perhaps it sits in the inbox of an overworked staff person for several days. How much time is lost as this slow workforce process executes? How many hands does the increasingly fragile package touch; how many places does it travel; how many chances are there for pieces of it to get lost; how many eyes must review it; how many times might it loop back through the system?

With workflow management and automation, the inefficiencies in such a process are entirely eliminated. First, the package is automatically scanned into a central database system. Simultaneously, it can be automatically routed to staff who never have to leave their desks to review and approve it. Instead of sitting in someone's inbox, an electronic timer attached to the package sets off an alert if nothing happens to the application within a period of time. That time period is specified by the people involved when the process is automated.

In this scenario, far less work is involved, there is nearly zero chance of papers getting lost, and reviews and approvals can all be done in a timely manner. The result? The waiting constituent can receive benefits decisions more quickly.

What are the benefits?

Optimizing and automating workflow not only speeds up processes, eliminating lost time and repetitive manual actions, but also increases effectiveness in serving constituents in a timely and satisfactory manner. Government agencies have a far better understanding at any instant of their productivity, of services delivered, and of resources expended. The enhanced view into operations provided by this technology solution also helps local and state governments meet increasing federal and constituent demands for transparency.

The return on investment from both hard dollar costs, like the elimination of most paper, and from larger but “softer” costs like reducing staff time inefficiencies can more than pay for the costs of implementing a workflow solution, even in hard economic times. Indeed, agencies implementing workflow have reported saving 30 percent of staff time, effectively increasing staff productivity by 30 percent. This is vital when staff numbers are being reduced.

Workflow optimization also vastly improves security. Consider the difference between storing paper in filing cabinets and storing documents in access-controlled electronic storage. Securing sensitive data and requiring authentication to access electronic documents vastly improves the security of constituents’ sensitive and private information.

Who’s doing it?

Washtenaw County, Mich.

Washtenaw County, Mich., serves 345,000 residents. Ann Arbor is the largest city in the county, and the University of Michigan and East Michigan Universities are also based there. Each township and university has its own independent police force.

- “The county sheriff filled out warrants on paper and then drove from one city to another to deliver them to the prosecuting attorneys’ offices,” said Ward Beauchamp, enterprise content manager in the county’s IT department. Filed in paper folders that were routed through the prosecuting attorney’s office, a warrant could take a couple of weeks to be rejected or issued to the sheriff. Using a workflow optimization and automation solution with complete document management, misdemeanor warrants now take just two days to be issued.
- Arraignments formerly meant transporting offenders to court so that they and the magistrates could sign the same documents. With the new workflow and document management system, inmates enter a video booth in the county’s new jail where the magistrate can arraign the individual and set bonds. The same electronic document is securely signed by the magistrate and by the offender, who uses a signature pad in the booth. Former “transport officers” are free for other corrections duties.
- Future plans include integrating all police forces in the county into the new workflow optimization and document management solution, combining the e-warrant and e-arraignment workflows and adding other critical county department workflows, such as contracts, into it as well.

Houston Police Officer’s Pension System

With just 21 employees, the Houston Police Officer’s Pension System (HPOPS) serves more than 8,000 members, including approximately 5,000 active police officers and about 3,000 retirees and survivors receiving pensions. Because of aging baby boomers,

the system experienced an increase in the number of retirees. The fund had to find a way to support the changing demographics.

- HPOPS’ previous workflow and document management system provided very little functionality and limited workflow development capabilities. It was inconsistent, unreliable, and had a tendency to “orphan” documents, but, most importantly, lacked adequate security. A new workflow optimization and document management system was adopted which addressed all these problems. It featured strong document logging, highly granular security, an extremely flexible workflow tool, excellent integration with an in-house line-of-business tool and ease of use.
- “Previously documents were generated and sent to me in paper form for my signature,” Eric Olson, director of Administration, said. “Then they’d be sent to Records for scanning. I would have big stacks of paper on my desk.” With the new solution, the entire process, from document generation to signature to filing, is all electronic and much faster. “We’ve significantly cut down on printing and mailing expenses,” Olson said.
- Ultimately, Olson wants to see all existing paper forms converted into electronic versions, generate all documents from the line-of-business application as Word files, and come up with more efficient, faster ways to distribute funds to pension recipients. With the new solution, “We have more options,” Olson said. “We’re here to efficiently run this plan and do the most with the least expense.”

Where can I find out more?

<http://www.hyland.com/resource-center.aspx>

Click on “A special report from The Accounts Payable Network — A detailed guide to imaging and workflow ROI”

<http://www.hyland.com/resource-center.aspx>

Click on (Webinar) “How to adjust to Government’s ‘New Normal’: Rules for IT Success”

Case Studies

<http://www.hyland.com/government>

Click on “Document management of state ERP estimates annual savings of \$7 million”

<http://www.hyland.com/government>

Click on “Agency does more with less: cases filed, found 60 times faster, despite 40% staff reductions”

<http://www.hyland.com/government>

Click on “Faster document access saves housing and finance authority \$1 million yearly”

UNDERWRITTEN BY:

HYLAND
SOFTWARE

About The Hyland Software Solution, OnBase

One of the world’s largest independent ECM software vendors, Hyland Software is the developer of OnBase. An award-winning suite of document and process management solutions, OnBase has a proven record of solving problems resulting from time consuming, costly and error plagued manual tasks. Available on-premises or as software as a service (SaaS), OnBase installs quickly, cost effectively and is designed to grow with organizations. Today, people at more than 9,500 organizations in 67 countries have the time to do the things that really add value thanks to OnBase. For these and other successes in its 20 year history, Hyland Software is a Leader in the Gartner Magic Quadrant for Enterprise Content Management, 2010. For more information, visit <http://www.hyland.com> and <http://www.hyland.com/government>.