



CASE STUDY



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Tom Rizas
Director of IT
New Concepts for Living

Care Organization Improves Lives of Developmentally Disabled While Spending Less Time Shuffling Paper

For over 40 years, [New Concepts for Living](#) has been taking care of the developmentally disabled community in New Jersey. They provide round the clock care in group homes, day programs, behavioral services, nursing, community inclusion programs, and transportation. As a community based not-for-profit organization, they are dedicated to serving developmentally disabled individuals and easing the burden on their families.

The Burden of Paper Files

With programs spread across two counties, New Concepts for Living has a lot of moving parts. When Tom Rizas, Director of IT, started at the company, file management was almost exclusively paper based. Accessing files required employees to sift through boxes and file cabinets to find what they needed, which took a great deal of time and effort. Many records across multiple departments had to be kept on file for up to seven years. Files were taking up needed storage space in the office, and there was no way to develop a system of metrics or reporting on information that was on a paper. Paper-based file management had become a hindrance to the goals of the organization.

Customer

New Concepts for Living

Industry

Care Organization

Critical Issue

Paper based file management causing file accessibility and storage problems.

Solution

Document Locator for electronic document control along with eForms to capture and digitize information and processes.

Software & Services

Document Locator
PerfectForms eForms

(800) 298-1172

www.documentlocator.com

ColumbiaSoft Corporation
15495 S.W. Sequoia Parkway
Suite 190
Portland, OR 97224



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The Search for a Paperless Solution Leads to Even Greater Possibilities

A solution was needed for a HIPAA-friendly, electronic document storage system. With the combined advantages of Document Locator and its integration with electronic forms, New Concepts for Living envisioned how document control and eForms working together would not only solve a paper storage crisis, but also greatly improve how information is collected, managed, and communicated throughout the organization.

Starting with the human resources department, they began creating electronic forms to digitize HR processes, improving the collection of information in everything from employee applications, to new hire paperwork, and much more. Now, when information is submitted, data is automatically captured and completed forms are automatically filed as a record in Document Locator. Files are secure and immediately searchable, solving the problem of accessibility and storage. No scanning or manual file entry is needed.

"The beauty of it is that Document Locator is automatically naming the files and folders and it's putting files right where we want them to be," said Tom. "So, for instance, anything that is HR related lands in the HR repository where it is secure and organized."

Documenting Required Reading

Tracking that an employee has read certain documents is an essential part of the new-hire process that has been automated in the system. While onboarding, staff must read an employee manual in a series of form-based steps. They read a page, hit next, read more, and so on. At the very end, they attest that they've read the manual, enter their employee ID which then populates their name, and they hit submit. The record of their acknowledgment is saved into their personnel folder.

Positive Impacts Across All Departments

Following the success in Human Resources, the paperless strategy has expanded to improve efficiency in almost every department. In just one example, a Staff Task Form was developed that allows managers to quickly assign tasks to their staff while at the same time improving the consistency and accountability of operations. The form contains dropdowns that allows a manager to assign up to 10 tasks per staff member, and the manager then uses that form to confirm when the staff member has completed their tasks. The record of task completions is automatically stored in the document control system. The entire process saves time and makes it easier for managers to oversee their staff, but most importantly it captures an auditable record for accountability.



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A Paperless Toolbox At The Ready For Urgent Situations

When the COVID-19 pandemic struck, the state issued new requirements regarding the tracking of pandemic-related information such as symptoms, travel, and contact history. With a platform at the ready, New Concepts for Living was able to immediately build new forms that captured and securely stored this essential information.

"We bought a bunch of Android tablets and built a form for each residence location. So, when someone walks in the door, they enter in their employee ID which populates their name and then they answer the required questions," said Tom. "This makes tracking of all the COVID-19 screening easy and as user friendly as possible."

Records Drive Data-Rich Analytics

Reporting is also utilized by Tom and his team, providing insights into form processes that were previously not possible with paper documents.

"When an agency comes in and says, 'show me how many of this particular item was written last January for Joe Smith', I can easily now bring that up with a report," said Tom.

Document Locator with eForms Drives Success

The combination of Document Locator and electronic forms has transformed New Concepts for Living's approach to information management and storage. According to Tom, their system has led to a significant reduction in errors and quadrupled the time they save filling out information.

"These forms make our lives so much easier in so many ways," Toms says of their solution. "This kind of stuff, it excites me, because it's making things better. And ultimately that's the name of the game; make things better."

Tom says the entire company is floored by their new approach and how easily everything works. He regularly gets requests for new forms, further expanding the usefulness of the system. Next, Tom plans to integrate the system with DocuSign to add digital signatures.

"This is not a standard kind of business. It's a little unique and there's not many that do what we do. There are some out of the box solutions, but they're very limited and they're very expensive. Whereas this is much better and much more customizable," said Tom. "Not to mention the Document Locator support team is amazing. They are always happy to help!"