

# Document Locator®

## Case Study > Pacific Northwest Collections, Inc.



“ Before using Document Locator, each person in the department spent approximately two hours a day dealing with issues related to paper files—pulling paperwork, typing, copying, refiling. That works out to about \$2,000 a month in associated costs to the company and its employees that we can now save. ”

Shannon Puaokalani  
Manager  
Pacific Northwest Collections, Inc.

### Established collections agency goes paperless, improving bottom line for itself and its customers

Employees of Pacific Northwest Collections, Inc. didn't like going into the back room. It was freezing in winter, and stifling in the summer. But they had to: It was full of filing cabinets containing essential documents. And when you're an agency that assists in collecting debts for everyone from doctor's offices to credit card companies, that's a lot of documents. 1,000 sq feet worth of files, to be exact.

### A hodgepodge of paper

Pacific Northwest Collections is a collection agency that has been in business since 1934. Their clients include doctors' offices, banks, landlords—anyone who's trying to collect on a bad debt.

With so many clients and so many payors, that's a lot of paperwork to track. The approximately 15-person staff would spend hours searching through filing cabinets, instead of contacting payors and clients. Files grew larger and documents more complicated. Something needed to be done to get employees out of the back room and onto the phone.

Shannon Puaokalani, manager of Pacific Northwest Collections realized that going paperless was the smart, inevitable way to go, and chose Document Locator for its Windows-based comprehensive capabilities, including full text search, drag and drop ease, and character recognition.

### Light bulbs going on everywhere

The company began to use Document Locator for simple tasks. First, in the collections department, scanning documents from clients to begin the debt-collecting process. But once they started with that simple task, it was “like a light bulb went on,” says Puaokalani.

**Customer:** Pacific Northwest Collections, Inc.  
**Industry:** Financial Services

### Critical Issue

Help a collections agency escape the paper chase.

### Solution

A comprehensive document management system that personalizes access, streamlines business, eliminates time and waste, and improves customer service.

### Software and Services

Document Locator  
Scanning Module  
Microsoft SQL

Document Locator is now used in these key areas at Pacific Northwest Collections:

## **Collections**

Staff uses it to load in new listings, keep daily correspondence, and review all paperwork. Any member of the collections department can view a file, anytime, leading to improved collaboration. In addition, multiple employees can view a file at once.

## **Legal**

As a collection agency, Pacific Northwest Collections must keep spotless legal documents detailing everything from the correct amounts owed to clients, to tax records of wage garnishments. With Document Locator, all legal files are now created and maintained electronically. They've eliminated a number of unwieldy paper files in favor of a streamlined, simple solution.

## **Sales**

Clients turn over delinquent accounts to a collection agency in hope of receiving payment. The sales staff at Pacific Northwest Collections has more than 700 clients. Any proposals, new business correspondence, client notes—it's all easily referenced in Document Locator, allowing the sales department to focus on getting new business and growing existing clients.

## **Bookkeeping**

Pacific Northwest Collections receives checks every single day from payors to clients. All this financial information must be distributed appropriately and noted accordingly. Document Locator helps track all payables, payroll information and receivables.

## **Document Locator: also a money locator**

Clients are already losing money when they enlist the services of a debt collection agency. So Pacific Northwest Collections' goal is to help them get their money in the most efficient way possible.

"Since employees in the Collections department work on a commission basis, time is—literally—money. Before using Document Locator, each person in the department spent approximately two hours a day dealing with issues related to paper files—pulling paperwork, typing, copying, refiling. That works out to about \$2,000 a month in associated costs to the company and its employees that we can now save," says Puaokalani.

The more time staff spends on the phone, the more money they make for the client. Wandering around the office in search of files doesn't add to anyone's bottom line.

## **Getting a closer look**

The biggest headaches can be the smallest accounts. Debtors may claim they already paid, or that they owe their doctor's office and not the agency. Having documents available after a few keystrokes allows staff to quickly pull up files to review. In addition, since multiple people can review a file at the same time, senior staffers can assist with difficult accounts while a payor is on the phone.

Monitoring who views what file is also a crucial attribute of Document Locator. Since Pacific Northwest Collections has many clients in the medical field, they need to obey medical privacy regulations like HIPAA. Document Locator can set privacy settings, restrict access, and show a log for every file that has been accessed.

And this isn't just for protected medical information, it's also for confidential financials: Only the bookkeeping department has access for specific financial information.

And if something catastrophic happens, like a fire, what happens to this information? All this is kept on a server that backs up every day.

Can't say the same for 1,000 sq. feet of filing cabinet space.

**(800) 298-1172**

[www.documentlocator.com](http://www.documentlocator.com)

## **ColumbiaSoft Corporation**

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