Centriworks Creates Custom PSIGEN Solution to Solve Nonprofit Agency's Paper Problem

About Centriworks

Centriworks is the professional services division of Thermocopy dedicated to providing comprehensive software solutions to improve productivity and increase cost-savings for organizations. Centriworks sells and implements systems that assist in creating electronic processes to decrease the need for manual workflows.

About ETHRA

ETHRA is a regional service agency in Eastern Tennessee that provides services such as child nutrition programs, housing assistance for low income families, transportation, workforce development and community corrections for 16 counties. They are a nonprofit organization with 425 employees that receives government funding for the dozens of programs they offer to the community.

The Problem

Because ETHRA is a nonprofit agency that receives federal, state and local funding, they are required to retain extremely accurate records of the services they provide, for audit purposes.

"Because of the type of work we do and where we receive our funding, we are audited frequently," said Cyndie Cecil, Support Services Manager for ETHRA. "We generate a lot of paper. It has to be moved from the county offices to the main office, where it is archived. We have auditors here all the time for different programs and we have to be able to provide them with all the records they need."

Keeping these documents on file was creating an issue for ETHRA's Accounts Payable department. In order to maintain accurate records, they were storing physical invoices and manually matching them to the corresponding check stubs. This process was very time-consuming. Every time ETHRA went through an audit, they would have to manually retrieve the files and then return them to the file cabinets.

"We write in excess of 2,000 checks a month," Cecil said. "[Prior to the solution implementation] when we would undergo an audit, someone would have to pull the checks from storage and then return them afterward. Sometimes we've been asked to provide 800 checks in one audit. It took such a long time."

Another issue ETHRA faced had to do with their children's nutrition program. In order to keep track of which child received a meal on any given day, the employees were required to fill out information on bubble sheets. The resulting filled-in forms would have to be manually tallied by an employee, a task that was very time-intensive.
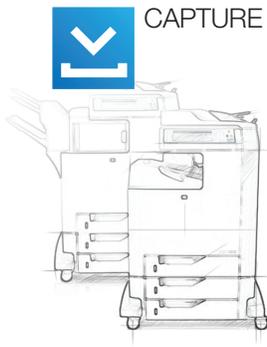
Solution Requirements

When Centriworks was given the task of creating a solution for ETHRA, they knew that above all, it needed to be extremely flexible.

"When we came to this organization we realized they had varied needs across the board," said Todd Sheppard, vCIO of Centriworks. "We needed a product that was flexible enough to do several types of jobs. We came into this project knowing it was a pilot program initially and that it would eventually expand into other departments. PSIcapture's flexibility was a great fit for the job we were tasked with."

The solution also had to be able to integrate well with several other systems, especially M-Files, and it had to be HIPAA compliant. PSIcapture's built-in migration for M-Files and compliance-minded security features made it a perfect fit.

CAPTURE

PROCESSING / OMR

MIGRATION

PSI**capture**

M-Files®

Employees from several departments scan in their documents to the appropriate folder.

Designated employees trained on PSIcapture handle the rest of the capture process. ETHRA also utilizes Optical Mark Recognition (OMR) technology to eliminate the need for manually counting bubble sheet data for the children's nutrition program.

PSIcapture processes the documents for auto-indexing the invoices and checks of the Accounts Payable department. After PSIcapture indexes the invoices, M-Files matches them up with the corresponding checks.

The PSIGEN Solution

Centriworks prescribed PSIcapture as the document capture solution for ETHRA. PSIcapture integrates seamlessly with M-Files, ETHRA's ECM system, making it easy for employees to scan paper documents into the repository.

PSIcapture provides several advantages for ETHRA. Auto-import allows employees from several departments to simply scan in their documents to the appropriate folder, where designated employees trained on PSIcapture then take over to handle the rest of the capture process. ETHRA also utilizes Optical Mark Recognition (OMR) technology to eliminate the need for manually counting bubble sheet data for the children's nutrition program.

"PSIcapture has been a huge time-saver for ETHRA," said Sheppard. "Instead of physically counting all those dots on the bubble sheet, PSIcapture tallies them up automatically. We've reduced a week's worth of processing time to a couple of hours."

ETHRA has seen significant improvement in their Accounts Payable department, which uses PSIcapture to capture and index their invoices and checks. They have been able to reduce the amount of physical paper taking up storage space and greatly minimize the time spent gathering documents during audits.

"PSIcapture takes care of the indexing legwork on the invoices so that M-Files can match them up with the checks on the backend," Sheppard said. "This solution saves the organization a significant amount of time when they have to pull this information for audits. They just recently purchased the Classification Module and will begin using it soon. They are also looking to bring the solution to other departments, since it has worked so well in Accounts Payable."

M-Files®

Simply Easy Document Management

Conclusion

The PSIcapture solution that Centriworks created for ETHRA has increased the organization's productivity by providing an easy way to house important files digitally, and has greatly reduced the amount of time employees spend searching for documents during audits. The implementation of PSIcapture has been so successful that the organization is planning to expand it into other departments.

PSIGEN software inc.   ACDI

Solution Components in Summary:

Capture Software:	PSIGEN PSIcapture with OMR and Classification
Content Repository:	M-Files
Scanners:	Ricoh MFP Copier / Scanners