

# Police pension delivers excellence in custodial fund management

## The Challenges

- Jumping between systems and filing cabinets made it hard to find information
- Maintaining paper processes created process bottlenecks and wasteful hardcopy costs
- Providing information for audits was a pain with records stored in different systems

## The Results

- Improves customer response time by integrating with in-house systems
- Increases productivity with powerful tools to find information fast
- Speeds through audits by offering immediate information access

## The Customer

The Houston Police Officers' Pension System (HPOPS) manages annuities for thousands of officers in the fourth largest city in the U.S. and it's no small task. Each officer's benefits and financial records require storage for long periods of time, from enrollment through retirement and beyond. Millions of documents must be responsibly managed. For HPOPS, it's not just about managing money. The fund takes pride in offering members peace of mind knowing pension benefits are safe and secure.

## The Challenges

Before implementing the OnBase enterprise content management (ECM) solution created by Hyland Software, HPOPS used EMC's ApplicationXtender® (AX5) to store and retrieve documents and manage business processes.

As time went on, searching through paper and electronic files to find needed information resulted in process bottlenecks and headaches. HPOPS needed tighter controls over document storage and workflow processing to maintain excellence in custodial fund management.

## The Solution

Instead of investing more time and energy into their existing ECM supplier, HPOPS realized it would achieve a lower total cost of ownership with a different solution that easily integrated with the existing infrastructure that made managing records painless.

"We were ready to grow and our old system wasn't ready to grow with us," says Eric Olson, HPOPS director of administration. "We wanted something that would be around for the long-haul." The OnBase ECM solution made it easy to match software to business needs.

## **Improve customer service by integrating programs with ECM**

Before implementing OnBase, HPOPS struggled with managing member information electronically. Users jumped between systems and electronic folders to transcribe member calls and calculate financials. Aside from juggling multiple business programs, locating the right file was another challenge to information gathering.

"Everything was put into one big electronic folder full of customer information organized by name," says Stephen Shalagan, records manager. "For the first couple of years there are five pages in the file, but after a decade there are 600." Looking for a single record was time consuming.

*“We were ready to grow and our old system wasn’t ready to grow with us. With OnBase, we know we have a solution that’s right for us today – and tomorrow.”*

– Eric Olson, Director of Administration

With OnBase, information retrieval is easy. Instead of looking in several programs to find information, HPOPS stores member records in the OnBase content repository where users locate the right file in seconds the first time by searching for the member’s last name or other unique identifiers.

Now it’s easier for HPOPS to provide superior member services by answering requests faster and eliminating the need to call users back.

#### **Automation simplifies process and ensures 24-hour service goal success**

For most pension funds, receiving loads of paper through the mail is unavoidable. Correspondence is crucial to effective fund management and it all needs to be printed, signed and stamped for certification before it’s scanned and saved for historical purposes.

As the number of incoming records increased daily, HPOPS knew that automating common form-related requests was necessary to meet a 24-hour operational service goal. OnBase reduces the stress and errors associated with manually processing repetitive business requests. According to Olson, “Almost 100 percent of our benefits processes run through workflow. When mail comes in, it doesn’t go to peoples’ desks. Documents are scanned in and either kick-off a workflow or land in an inbox for electronic signature.”

Members save time by sending electronic requests to HPOPS over a secure website when it’s convenient for them – day or night. As a result, HPOPS saves on postage and other hardcopy costs by offering commonly requested forms online. With the right workflow tools, HPOPS is sure to meet its 24-hour turnaround goal with ease all while improving customer satisfaction.

#### **Speed through audits by offering immediate information access**

Security and confidentiality are of utmost importance to fund managers. It’s common for organizations like HPOPS to undergo periodic audits from governing agencies. To maintain compliance and avoid costly fines, the fund manager ensures strict custodial care over the integrity of members’ records.

The OnBase audit trail tracks and stores everything about a document, from who created it to who changed it and everything in between. The best part is that the audit trail is tied to the document for life, saving time and eliminating costly professional services fees. Reports are easily created and provide management with insight into where accounts stand at any point in the process.

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#### **Why OnBase?**

As stewards of fiduciary benefits to Houston’s finest, HPOPS takes pride in offering members peace of mind knowing pension benefits are safe and secure. By combining existing programs with OnBase, staff now finds information in seconds. Repetitive and manual benefits processes have been automated so HPOPS now provides faster, more accurate results to members.

Learn more at [Hyland.com/Government](http://Hyland.com/Government)

**OnBase**  
a Hyland Software solution