Marion County Health Department

Workflow sets the record straight in Vital Statistics

The Challenge

Whether change is an obstacle or an opportunity depends on how you perceive it. Julie Bishop, administrator of Vital Statistics in the Marion County Health Department (MCHD) decided to embrace technology changes and implement enterprise content management (ECM) to make life easier for employees and the more than 850,000 residents of the Indianapolis metro area. An OnBase solution not only helped address the immediate concerns at that time, but it has also provided a platform for ongoing enhancements that have improved customer service and employee morale.

MCHD generates about one-third of the state's vital records data, including records for more than 10,000 deaths, 20,000 births and 5,000 corrections. It maintains and provides court documents involving adoptions, paternity and other "human life events," many of which are confidential. While fees for applications or filings range from $10 to $15, the Vital Statistics office generates about one million dollars in revenue because of the volume of requests.

"The reason we did this was to improve customer service. We have a huge volume of walk-in customers, and we wanted to be able to serve them well and provide the community with the type of service it deserves," said Bishop. Prior to implementing OnBase, an integrated suite of ECM software solutions from Hyland Software, MCHD maintained electronic databases of records covering several decades and millions of microfilm images dating back to 1872. When someone came in to request a document, determining which system the document was cataloged in and where it was located could create customer wait times of several hours.

The inability to provide efficient service was frustrating for MCHD employees as well. Turnover was high, and the complexity of sifting through a disjointed collection of paper, microfilm and card files made it impossible to train new employees quickly.

"I love to amaze the community with the speed, accuracy and responsiveness of our agency and see people go away happy."
– Julie Bishop, administrator of Vital Statistics, Marion County Health Department

CUSTOMER
Marion County Health Department

INDUSTRY
Government — County Health Department

SIZE
850,000 constituents

LOCATION
Marion County, Indiana

DEPARTMENTS USING ONBASE
Health
Housing
Legal
Vital Rewards

OnBase® by Hyland

For accountability purposes, the application itself is stored in OnBase, which also provides an audit trail and document history for every document in the system.

The Solution

Documents come in to the MCHD in a variety of ways, but all of them can be managed by OnBase. For example, Birth data is received electronically from hospitals, and a corresponding paper Certificate of Live Birth is mailed from the hospital. The paper document is batch-scanned into OnBase and then automatically matched with the birth data for indexing. Regardless of how the documents became part of the OnBase repository, they can be retrieved immediately using keyword searches and cross referenced with related documents. Cross referencing allows a user to double click on one document, such as a birth certificate, and automatically retrieve a related one, such as a death certificate or paternity affidavit.

After reviewing death certificates and burial transit permits brought to the office by funeral directors, a clerk will provide certified copies immediately. Using OnBase Document Imaging and Workflow, the certificates are scanned into the system. Appropriate indexing values are retrieved from a death data entry system. Data entry clerks complete any missing fields, verify and conduct quality assurance on the images and corresponding index fields. MCHD will generally accomplish all of this within the first two hours of every morning, meaning that a death certificate received on Monday will be in the system no later than 10 a.m. Tuesday.

Initially, walk-in applications for documents, such as birth certificates, were filled out by hand, scanned and destroyed the following day. While an improvement over the previous system, it still generated a lot of paper and sometimes the images were illegible. Now, an intake clerk creates an e-form cover page that kicks off a workflow and keeps the related documents together. The clerk interactively completes the form with the customer and verifies their identity. The customer can sign the application using an electronic signature pad. Accompanied by the cover sheet, the forms then transition to the cashier work queue for completion.

By the time the verification process is complete, the cashier is waiting with the requested document with the seal affixed and the fees calculated, reducing wait times from hours to minutes. For accountability purposes, the application itself is stored in OnBase, which also provides an audit trail and document history for every document in the system.

Customer service has also improved for those contacting the MCHD by phone or mail. Mailed requests for certified copies are also managed by OnBase Workflow. The applications are scanned to a mail queue, where they are reviewed and matched up to the appropriate certificate, which is then printed and sealed. Workflow timers monitor the queues and assure that action is taken in a timely manner.

If someone calls to check on the status of a document request application, any MCHD employee who answers the phone can view where the application is in the process, including any supporting documents. "Since we implemented OnBase Workflow, mail that comes in by 9 a.m. today is generally out by 9 a.m. tomorrow," said Bishop. "Expedited requests are guaranteed to be sent out by 4 p.m. the same day for Federal Express delivery the next day."

Vital Statistics is also responsible for collecting accurate records, including paternity affidavits and corrections. MCHD has configured OnBase to work in conjunction with IBM Lotus Notes to manage these interview appointments, which are scheduled in the iNotes calendar. The scheduler completes an e-form, and OnBase Workflow collects the appropriate documents into an electronic file, reducing the preparation time and assuring the interview is conducted more efficiently.

Once entered into OnBase, paternity affidavits can be cross-referenced with birth certificates, making it easy to fulfill document requests that were once labor intensive. By law, all paternity affidavits for Marion County must also go to the county prosecutor's office, which was quickly overwhelmed by the volume of paper. Now, the affidavits are published to CDs, which can be efficiently searched and more easily stored.

With OnBase, response time has been reduced to a fraction of what it once was, and staff can be trained more quickly. "We can train in less than a week; it used to take four months before we could trust that an employee could accurately retrieve records. We add rights as they progress, both in experience and in being trained in all the legal restrictions and HIPAA privacy and security training," said Bishop. Strict user rights have been configured to allow access only to those OnBase documents necessary to complete their work, and some images have been permanently redacted to assure that privileged information is protected. This provides the Office of Vital Statistics with greater control of data that must be shared for public health purposes.

Though OnBase was implemented to improve the "human" side of MCHD's processes, it has also proven advantageous for the business operations. For instance, in the workflow for handling applications mailed to MCHD, the indexing information includes the amount and method of payment. When the daily mail has been processed, OnBase can provide a total of monies received that can be balanced against the accounting system. For applications in holding queues (such as those for which critical identifying information is missing), a report can be run to identify what outstanding liabilities are owed to customers for unfulfilled requests. Bar codes on certificates and POS (point of sale) cash registers that generate reports will provide even tighter accountability. "We've reduced financial reporting from three to seven days to the same day," says Bishop.

"Over the years, we've added modules and departments, and it will continue to grow, possibly to the entire enterprise. The more we automate and integrate, the more the staff wants to use OnBase for new things. Many of our users have come up with ideas that we have used."

– Julie Bishop, Administrator of Vital Statistics, Marion County Health Department

The success of MCHD's OnBase solution now includes the Housing and Legal departments. The Housing Department archives reports from its line-of-business application and stores and manages court documents and digital photos. The Legal Department's OnBase solution uses the Web client to provide secure access via a Web browser to view and conduct full-text searches of ordinances, board minutes, agendas and other public records.

The Difference
- With OnBase, customer wait times virtually eliminated
- Reduced financial reporting from seven days to same day
- Flexible solution evolves as needs and technology changes
- Heightened security for confidential documents
- Reduced staff training time

Learn more at **OnBase.com/Government ››**

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