M-Files®

CASE STUDY

FROM PAPER-INTENSIVE TO PAPERLESS

M-Files®

Company Name
East Tennessee Human Resource Agency

Industry
Non-Profit

Location
United States

ETHRA IMPLEMENTS AN AWARD-WINNING INFORMATION MANAGEMENT PROGRAM WITH M-FILES

East Tennessee Human Resource Agency (ETHRA) is a nonprofit human resource agency providing services throughout the region that help families and individuals remain independent and find opportunities to succeed, including meal services, elderly care and services and transportation. Located in as many as 24 Tennessee counties, the organization oversees between 30 and 40 programs that are funded by state, federal and special grant dollars.

With dozens of programs serving thousands of people, the organization was generating a lot of paper –more than they could handle. And because they were subject to multiple state and federal compliance regulations and regular audits, ETHRA was required to keep a large portion of its hard copy paper records, sometimes for up to 10 years. Meanwhile, ETHRA's storage space was rapidly shrinking and this physical paper-based storage model was becoming unsustainable.

WHY M-FILES?

DOCUMENT MANAGEMENT

RECORDS MANAGEMENT

COMPLIANCE

DOCUMENT RETENTION REQUIREMENTS CREATING UNMANAGEABLE PHYSICAL PAPER REPOSITORIES

Considering the enormous amount of paper that was being generated daily, finding available space to put it soon became a significant problem. Paper records were stored in large warehouses both on and off premises. If an auditor wanted to see a file, two or three people had to be pulled off their regular job duties to access the desired file at the warehouse, often sifting through several hundred files at a time. The company eventually became so overwhelmed with paper records that boxes of files could routinely be found in offices and under employees' desks.

"The document retention rate for some of our programs can be very high and failing to store these records is not an option," said Cyndie Cecil, ETHRA documents and processes manager.

Numerous programs in the organization were beholden to extensive audits that required them to produce detailed accounting and financial information at the drop of a hat. Document retention is also required by several grants that provided funding. In addition, some programs also had copious legal documents – all of which were required to be kept for a stipulated period.

As the amount of paper records continued to grow exponentially, one thing became clear: ETHRA needed a comprehensive file and document management solution that could be compliant with document retention timelines and restore order to their systems.

"Finally, we drew a line in the sand and said this is not sustainable," continued Cecil. "It's expensive and exhausting."

> "
>
> *"The ability quickly find information at the touch of a button has improved employee productivity and helped ETHRA better meet compliance requirements faced by our organization on a reoccurring basis."*
>
> *Cyndie Cecil,*
> *ETHRA documents and processes manager*

like the new solution, and if it does not cater to their individual needs or align well with existing processes, they will not use it and will find ways to work around it.

"We were a little hesitant to engage with a new document management platform because we had a bad taste in our mouth from a previous solution," said Cecil.

ETHRA researched a few options, but M-Files came highly recommended, and ETHRA was convinced with its intuitive user interface as well as the unique metadata-based approach. With M-Files users no longer have to worry about where to store files, because the metadata establishes content in context and automatically stores files correctly.

"The metadata was a selling point. If we scanned in a document, M-Files can automatically read the document, tag it with metadata and store it where it needs to go," said Cecil.

THE SEARCH FOR A RELIABLE, USER-FRIENDLY INTELLIGENT INFORMATION MANAGEMENT SOLUTION

ETHRA staff knew they had to digitize most of their paper records or risk losing critical information. But, they were wary. The organization had previously invested in a document management solution, but it wasn't user-friendly, and it didn't align well with their processes.

ETHRA knew that user adoption is key to success when it comes to a transition process like this. If the users don't

M-FILES IMPLEMENTATION BOOSTS PRODUCTIVITY, ELIMINATES PHYSICAL PAPER STORAGE

ETHRA's M-Files implementation was easy and quick. M-Files was deployed first in the transportation department, where the volume of its paper problem was originating, and was later deployed in the accounting department to help expedite the auditing process. While not every ETHRA program is audited, every audit involves the accounting department.

As anticipated, the M-Files platform quickly read information on a document, captured the metadata and then instantly categorized and stored the document in the appropriate place. This greatly reduced employee workload, boosting productivity across paper-intensive programs. For auditing purposes specifically, M-Files empowered the accounting department to quickly and intelligently search and locate several hundred documents for auditors in mere minutes, as opposed to hours, removing the time-intensive manual labor that resulted from having to rifle through hundreds of thousands of files, stored in multiple warehouses, to locate documents.

"The ability to quickly find information at the touch of a button has improved employee productivity and helped ETHRA better meet compliance requirements faced by our organization on a reoccurring basis," said Cecil.

But most importantly, M-Files vastly reduced the amount of paper the organizations had been using, freeing up space and employee time almost immediately. Banks of file cabinets and boxes of files under employee desks disappeared. And the organization was able to benefit from an eco-friendlier approach to information management.

REDEFINED INFORMATION MANAGEMENT APPROACH STREAMLINES TRANSPORTATION DEPARTMENT PROCESSES

As part of its services it provides, ETHRA transports individuals to medical appointments, dialysis or other healthcare related needs. As per the organization's policy, department drivers are required to turn in paperwork and vehicle inspection forms following their routes. The expected problems occurred, however, when management and accounting staff were looking for a specific form or report amidst hundreds being hand delivered from drivers in 16 different counties each week.

To resolve the issue, the drivers were encouraged to attach their paperwork to an email. But considering the number or drivers, many with limited technical ability, compounded by the fact that they had to stand in line and wait to use the few computers available after they finished their routes, it became clear that another approach was needed.

"It just wasn't working," said Cecil. "We sat down and said, 'we don't need another computer, we need a whole new process.'"

That's where M-Files came in. The solution allowed the drivers to easily scan their required documents right into the folder. From there, administrators could pick up as soon as it was completed, and the process was streamlined.

ETHRA'S AWARD-WINNING INFORMATION MANAGEMENT STRATEGY

Almost 10 years after being first implemented, around 20 different programs within the organization are leveraging M-Files to reduce paper consumption, better organize data and to quickly access audit and compliance information. ETHRA also has greatly expanded the number of licenses as it continues to expand M-Files across the company, onboarding new programs and users.

The Assistant Director of ETHRA transportation department, Brent Gagley, was recognized as the Rural Transportation Support Employee of the Year by the State of Tennessee for the strategic implementation of M-Files into the transportation paperwork review and process, which resulted in more timely document submissions and easier access to those documents.

"In the future we hope to incorporate M-Files into more programs and processes, automating more of the repetitive aspects of our work," continued Cecil. "Most things still require human eyes. But, by using workflows and more efficient methods M-Files can save us time and steps, which ultimately translates to cost savings."