

Document Locator®

Case Study > Oregon Professional Liability Fund

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Jeff Crawford
Administration Director
Oregon Professional Liability Fund

Smart software transforms usefulness of important archives at Oregon Professional Liability Fund

Oregon's Professional Liability Fund was established more than three decades ago. It's the mandatory provider of basic malpractice coverage for all Oregon lawyers in private practice—about 7,400 around the state.

In addition to providing the mandatory \$300,000 coverage the Fund also writes coverage up to \$10 million on an underwritten basis through its “Excess” program.

However, before obtaining Document Locator, the Excess program had a lot of excess baggage.

Piles of paper

Historically, insurance operations have been very paper intensive. Between underwriting and claims, the Fund generates about 150 bankers boxes of files each year. The Fund's work demands a very high level of accuracy, and a strong ability to properly file and retrieve specific documents. The consequences of just one misplaced file could potentially be devastating to the Fund's finances and reputation.

To locate a specific document, the requester would need to ask someone with specialized knowledge of a particular section of the filing system. And if the information was stored off-site, finding what was needed was even more cumbersome. With so much stored out of the office, employees weren't inclined to go through the trouble of delving through pounds of paper—leaving the Fund's useful archives untapped.

Out of the box—literally

Realizing this was an unsustainable method for their increasingly growing business, the Fund purchased Document Locator in August of 2008 through Portland-based service provider CTX.



Customer: Oregon Professional Liability Fund
Industry: Professional Liability Insurance
Website: www.osbplf.org

Critical Issue

Archives containing useful information were difficult to search, making it hard to retrieve information.

Solution

An electronic document management system that manages 150 boxes' worth of paper per claim and makes it easier for fund staff to tap knowledge of important archives.

Software and Services

Document Locator
Email management
Document Workflow
Document Scanning
Web Access
eCopy Integration

At first, the Fund used Document Locator to imitate their existing organizational structure. Simply known as the “box system” - which was physically moving documents from one box to another during use - they primarily used Document Locator’s search function to find what they needed, although not much else.

Soon, however, with the help of the ColumbiaSoft team, they realized the multiple benefits that Document Locator offered, coming to a literal “out of the box” solution. “It has been great working with ColumbiaSoft on the paperless transition. They are very responsive to our needs, responding rapidly to any questions or concerns we have,” says Ted Cave, Document Management Assistant.

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of our paperwork...it has changed our archival material into a powerful reference tool available at all times, accessible with a minimum of training,” says Jeff Crawford, Administration Director.

Increasing collaboration across departments

With the Fund putting Document Locator to good use, they are now examining how the system can benefit other areas of their business, including accounting, database management, claims, and administration.

With the ability to sync up with other Microsoft applications, employees—even the technology-averse folks—find it simple to use and it has increased usage of other applications as well. “We want to integrate it as much as we can,” says Cave.

Time- and cost-savings

It’s no secret that time is money when it comes to the legal profession. Many of the Fund employees who use Document Locator are attorneys or other highly-skilled professionals whose time is very valuable. While it’s difficult to ascertain the number of billing hours wasted paging through paper looking for lost files, it’s safe to say that the ease of finding what’s needed is an asset to both the Fund and its clients.

Time, money and now space. One program at the Fund has reduced onsite paper storage from six filing cabinets to a single cabinet drawer—a space savings of 90 percent. Once Document Locator is fully implemented, the Fund expects to free up at least 2,000 square feet of usable space—leading to addition work areas and a more pleasant environment.

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