Document Locator®

Case Study > Horizon House Senior Living

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>
> **Troy Schneiter**
> **Systems Administrator**
> **Horizon House Senior Living**

Customer: Horizon House Senior Living
Industry: Non-Profit Retirement Community
Website: www.horizonhouse.org

Critical Issue
How to eliminate unnecessary costs and inefficiencies tied with the handling of paper files in areas like accounting, residential records, and project management.

Solution
A unified and versatile document management platform that is easily configured to the diverse needs across the organization.

Results
An immediate savings of staff time in finding files faster, savings of valuable office space no longer occupied by filing cabinets, and a team kept well-informed with automated notifications and workflows.

Software and Services
Document Locator
ScanStation

Easing the woes of information management frees more time for core mission.

"Providing an unregimented lifestyle, free from the burden of home ownership in one of the most desirable locations in downtown Seattle, Washington with its many restaurants, theatres, and art galleries" is just the beginning of what Horizon House Senior Living has to offer its' over 400 residents.

A premier Continuing Care Retirement Community (CCRC), Horizon House was established in 1961 and provides a full spectrum of services for residents from complete independence to individualized care in their Supported Living program. They promote independence, community service, creativity, personal growth and self-determination, while striving to enrich residents' lives socially, recreationally, educationally, and spiritually.

As a non-profit corporation, affiliated with the Pacific Northwest Conference of the United Church of Christ, Horizon House reinvests proceeds into enhanced services for residents and benefits to the surrounding community.

Creating a more efficient office

With a mission to serve residents and community, the 375-member staff at Horizon House are keen to eliminate unnecessary costs and improve back-office efficiencies. However, a fast growing archive of paper documents raised concerns and prompted some to question if there were better ways to manage information.

"Filing cabinets were taking up valuable space, and the manual filing of accounting records had become a significant burden that was consuming valuable staff time," said Horizon House Systems Administrator Troy Schneiter. "Everything from copies of checks, to insurance policies, to accounts payable billing files are kept on hand, and paper is an inefficient way to manage records."

Realizing there had to be a better way, Horizon House turned to their long-time trusted advisor for information technology, Seattle-based SWAT Systems. Their recommendation: Document Locator by ColumbiaSoft.

ColumbiaSoft™

Microsoft Partner   Autodesk Authorized Developer   Adobe Solutions Network Commercial Developer   Kodak Document Imaging Products INDEPENDENT SOFTWARE VENDOR

Streamlining accounts payable

Using Document Locator, Horizon House set-out to take their Accounts Payable (AP) records paperless. A two-year archive of AP files was back-scanned, and new procedures were implemented to digitize all incoming AP files on arrival. Information that had once been time-consuming and difficult to find in rows of filing cabinets was now instantly full-text searchable in digital form. Files were easy to retrieve.

"Prior to Document Locator, a lot of hours were spent by department managers going through filing cabinets researching hard copies of invoices for budgeting, payment histories, and new project planning," said Schneiter. "Document Locator produced an immediate savings of time, and the bonus was that we recovered space by eliminating filing cabinets equal to an entire office, which was significant in terms of the value of downtown office space."

Extending the system to organize resident files

With a platform for document management in place, it didn't take long for Horizon House staff to imagine the possibilities for improving other areas where paper records were creating chaos. Resident files were a logical next step.

For each of the community's 400 plus residents, an assortment of documents and forms are kept on file. Some records are stored for future reference; others drive internal processes involving property management projects and renovation requests.

The trail of documentation begins with the very first conversations with each new prospective resident, so this is where Schneiter and his staff turned their attention.

To solve the problem, information needed to be structured from the start so that over time everything from agreements, letters of intent, forms, applications, resident communications, and more, would be properly organized. Document Locator's AutoPath technology, with its ability to create consistent folder structures was the solution.

"Folders and sub-folders for all the medical, financial, facilities, and communications records are built automatically so that when a new resident arrives, the structure of how information is stored is not left to chance," said Schneiter. "Document Locator's auto-folder technology takes all the guess work and errors out of folder structure creation and organization."

Project documents get organized

Resident files in general represented a significant area of concern, but one matter in particular had an impact on accounting that needed further attention.

Horizon House's 400 plus residents can choose to renovate their living accommodations every ten years, and each renovation project generates a considerable amount of construction project documents.

In the past, all construction and renovation documents were managed in several large filing cabinets. File management is critical to a successful renovation, and ultimately a proper project close-out. For example, accounting must be aware of all vendor invoices in order for payments to be made on time and to provide residents with full and complete billing.

"Managing documents for multiple renovation projects requires a lot of administrative overhead," said Schneiter. "Through using Document Locator's electronic workflow, we're routing project documents automatically so that everyone stays informed throughout the project."

With Document Locator in place, a more successful close-out is achieved. Invoices and other files are routed electronically, and project documents are categorized with appropriate metadata (facts about the files) for accurate cross-reference and auditing.

A paperless horizon

The benefits of electronic document management have proven effective in so many areas of operation at Horizon House, that they are now looking forward to extending their use of Document Locator even further. Everything from records in Technology Services for residents, to workforce files in Human Resources are under consideration. With a flexible platform in place, virtually anywhere paper or electronic documents are in use, improved efficiencies can be achieved.

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