11/29/18

Responses to question regarding who has gone paperless.

CTHC - We started using Docuware for electronic filing at the end of 2009 after reviewing several systems.

We started using Docuware with the Accounting Dept. because their documents were the most straight-forward and uniform on a monthly basis. After that was up and running smoothly, we started utilizing it for routine administrative filing such as board packets/minutes, write-off information sent to the credit collection agency, etc.

Our ultimate goal was to get our resident files in Docuware primarily for safekeeping (fire, storm damage, etc.); however, we could also see the benefit of Complex Managers being able to access and utilize resident files at their desks. Since we had over 900 active resident files, this was a very time-consuming process. We were able to utilize a part-time employee to complete all of this scanning. We currently have all Temple and Belton resident files in Docuware, and it is working well.

Fortunately, members of our staff were able to develop fillable pdf documents routinely used by Housing, which eliminated the step of scanning "hard copy" documents into the program. We have also used iPads to allow residents to "sign" these electronic documents.

Docuware also allows us to file documents directly from Lindsey so we no longer have to print them. This was the other main reason we decided to purchase an electronic filing system – less paper, ink, storage boxes, storage space, etc.

Since we have been implementing the use of this program throughout our organization over the past nine years, here are some additional thoughts and "lessons learned" others may want to consider. These were provided by our Program Specialist, Cathy Barnes, who was instrumental in getting this system up and running. She has also continued in the role of our Docuware "guru" as we have expanded its use into the various departments.

· Set-up is key, plan ahead how/what items are going to be labeled and stored

· Start small, then expand

· Start with the easiest items (Accounting individual files for us, then onto Housing folders)

· Learn to adapt to changes – the plan should be fluid

· If using over many departments, make sure all are supportive before you start

· PDF forms were a big help – make them first and consistent for every user

· Use updated software and hardware

· Use a storage system that is able to be used at different physical locations, if necessary

· Train any new employees/locations with the same instructions/methods

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Beaumont - Our agency uses FileVision for all our document management needs. We are happy with their product and would recommend them.

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Garland - We have/will be going paperless. Our city uses a scanning solution called ONBASE that we scan all documents into. Eventually we will be using a software solution by HAPPY to go paperless even more.

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Grand Prairie is totally paperless

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Greenville - Just purchased equipment. Still in training and learning process. No experience or procedures yet. Does anyone have written procedures they would like to share?

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Luling - We are working on it. We use Lindsey I pad work orders and inspections. We are using e-tenant file also to capture the signatures for move-in and int-rem exams.

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Lubbock is paperless. File Vision, Good product, interfaces with our HAB software.

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New Boston - Yes-sort of. Started in 2010 and still not quite there. Hire a company to help.

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Schertz - WE HAVE NOT YET; BUT ARE PLANING TO IN 2019. Our client software company Lindsey Software Systems already has their system programmed for paperless. They have an integrated system (client/accounting/work orders, etc). We purchased special scanners for each desk to facilitate & make it easier/faster for staff to scan & go on with their input of the work & not have to keep getting up to go to the scanner in another room, etc. We will see how it works. We are working out the process/procedural steps at this time. We have been looking into this for the last 5 years. Now that Lindsey has the capability to manage/store the data from their software, it is doable with less work. Wish us LUCK & GOD SPEED!!

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El Paso is paperless.