Inside Family Service Toronto's Digital Records Transformation

Customer Overview

FAMILY SERVICE TORONTO
For People. For Change.

Name

Family Service Toronto

Location

Toronto, ON, Canada

Industry

Counselling, community development, advocacy and public education programs

Web

familyservicetoronto.org

Challenge

Reclaim space and raise workflow efficiency for Family Service Toronto by creating searchable digital files from documents — eliminating the cumbersome processes involved in storing, retrieving and working with paper-based records.

Results

ABBYY Recognition Server automated the capture and conversion of documents into searchable digital records that are easy to store, and much easier to access — reducing costs and giving people more time to focus on strategic initiatives.

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Funded by the Ministry of Community and Social Services (MCSS), Passport is a program that helps adults with a developmental disability in overcoming life challenges. It offered hope to untold numbers of people in Ontario. Delivering on that promise, Family Service Toronto undertook a digital transformation project to implement document management and document intake workflow to reduce labour intensive, paper-based processes involving significant data entry. To optimize its technology investment and gain instant access to technical expertise and best practices in digital transformation, Family Service Toronto elected to partner with a Managed Application Services provider to help reduce capital costs and achieve greater business agility and operational excellence.

"We're very happy with the support and assistance from PFI... They go over and above. This was my first technology 'adventure.' It's been an ice-breaker in our culture that will help us tackle other things."

Vani Visva, Director of Finance, Family Service Toronto

The Customer

Family Service Toronto (FST) is one of the city's largest service agencies working to assist individuals experiencing various life challenges. For 100 years it has been assisting families and individuals through counselling, community development, advocacy and public education programs for everyone who lives or works in Toronto.

The Challenge

Paper, Paper and More Paper. When it came time to start planning the move to its new downtown headquarters, Family Service Toronto could no longer afford to keep as many physical records in a basement or off-site storage. According to Vani Visva, the agency's Director of Finance, these records could fill more than 500 bankers' boxes. Many of these records have to be retained for a period of time to comply with legislative requirements. That volume of information isn't going to be reduced anytime soon.

The province of Ontario's Passport program, for example, is designed to help reduce wait times for adults with intellectual disabilities. This program alone led to more than 3,000 submissions that need to be processed each month.

Process Fusion Inc.

Process Fusion Inc. (PFI) is a managed services and cloud application provider of Secure Information Exchange (SIX) and Business Process Automation (BPA).

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About ABBYY

ABBYY is a leading global provider of technologies and solutions that help businesses effectively action information.

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Like many similar organizations, Family Service Toronto has not traditionally been a highly digitized workspace. "A lot of paper was being created," Visva says. "We are responsible for reimbursing the money for the services clients are using." This could be invoices or other documents that come through e-mail, of course, but also via surface mail, dropped off in person or through faxes. While the team had used a customer relationship management (CRM) system to handle claims, reviewing and approving submissions were handled on paper.

The Solution

Family Service Toronto had moved to Xerox DocuShare as a way of digitizing much of its traditional paper processes, but buying the technology was only the first step.

"Once we bought it we realized our IT department, which consists of two people, didn't have the capacity to support it," Visva explains.

Visva and her team were introduced via Xerox to Process Fusion Inc. (PFI), which provided a Managed Application Services for Family Service Toronto's DocuShare application.

First a private, secure instance of DocuShare was set up for Family Service Toronto at a Canadian Tier-III certified data centre with high availability, data retention and disaster recovery capabilities which FST would not be able to achieve with its own infrastructure.

Next, PFI was able to set up a dynamic document intake workflow to capture client information coming from fax, email and letters that were delivered by postal services. The heart of this workflow is Abbyy Recognition Server, which performs optical character recognition (OCR) to convert faxes and scanned images into searchable PDF format. This makes full text search on DocuShare become possible.

"Many companies are increasingly turning to our Managed Application Services in order to enjoy the benefits of onestop support," said Daniel Cheng, president of PFI. "From user account creation to service monitoring to software maintenance, Family Service Toronto can rely on PFI for all DocuShare-related matters."

The Results

Since DocuShare and the related document intake workflow have been deployed and managed by Process Fusion, Family Service Toronto has grown their DocuShare environment to support approximately 40 active users benefitting from the features they provide. This includes:

Automated capture of client information: Documents coming from email and faxes are automatically processed with the use of Abbyy Recognition Server. Paper documents delivered by the postal service will also go through the same process after scanning. Client information on documents can be extracted and captured automatically. Documents along with the extracted information are then uploaded to DocuShare for the verification and approval workflows.

Easier access and retrieval: With all documents going through the OCR process, information can be searched and retrieved in a much faster manner. Visva says. "Now we don't have to run around looking for the documents." Role-based security, meanwhile, ensures those working in a particular department will only be able to see the files for which they've been authorized.

Improved accuracy: With client information extracted automatically in the document intake process before going into the verification and approval queue on DocuShare, time spent in typing and retyping has been reduced. "Everything that comes in is going to be put in a queue and then whoever processes that on our staff will be picking up that form and double-checking what they're supposed to do," Visva says. This reduces time spent in data entry but also provides accuracy of the data.

Reduce costs and meet financial metrics: Family Service Toronto is able to put more of its resources where they matter most, now that the digitized processes reduce the cost of storing documents and help automate business workflow. The managed application services model shifts the financing from a capital expense to an operational one. In other words, it reduces the upfront cost as well as the risks associated with a technology project.

Allocate talent and skills to focus on core competencies:

Family Service Toronto relies on Process Fusion to support and manage the complete solution, with the added security of having it hosted in a secure Tier III data centre in Canada. The managed application service also offers integration with other mission critical applications, including CRM and AIM.

All this means Family Service Toronto can focus its own people on strategic initiatives. "We're very happy with the support and partnership from PFI," Visva says. "They go over and above. This was my first technology 'adventure.' It's been an ice-breaker in our culture that will help us tackle other important things."

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