



SUCCESS STORY FOR GOVERNMENT

Sacramento County

Sacramento County harnessed Kofax solutions to transform mountains of paper files into rich electronic content—saving millions of dollars and supercharging operational efficiency. Now the County is taking document imaging to the next level by extending capture capabilities to front-line teams, connecting them to critical information faster than ever before to speed up service delivery to citizens.

Challenge

Sacramento County comprises more than 30 departments, the largest—and one of the busiest—of which is the Department of Human Assistance (DHA). Employing more than 2,000 people across multiple locations, DHA oversees a spectrum of programs and services designed to move people from public assistance to independence.

The DHA manages a heavy workload, processing cases that are vitally important for citizens utilizing DHA services. With its caseworkers relying on manual, paper-driven methods to manage these cases in the past, delays and errors could slow the response to citizens and threaten to impact the delivery of potentially life-changing benefits.

Doug Kudlick, IT Manager at Sacramento County, explained: “DHA caseworkers work with huge volumes of content every day. The Department has roughly 1,000 different forms that it uses to capture all kinds of information from citizens applying for social assistance, from the application forms themselves to identification documents, bank statements and more.

“In the past, when everything was on paper, teams found it challenging to track down all the documents they needed to work on a particular case. What’s more, as it was difficult to move paper documents between different locations, specific caseworkers ended up handling everything for a particular set of customers, which meant that workload wasn’t always evenly distributed.”



Sacramento County, California, is home to more than 1.4 million people. The County government is composed of an elected five-member Board of Supervisors, several other elected offices, and numerous county departments and entities, which provide services ranging from elections and voter registration, law enforcement and tax collection to public health and transportation.

Products in Use:

- ◆ Kofax Capture™
- ◆ Kofax Front Office Server™
- ◆ Kofax Transformation™

Focus: Content capture, multi-channel capture

Partner: Western Integrated Systems

“We are looking forward to taking our electronic content management capabilities to the next level with Kofax solutions, and unlocking new opportunities to deliver even more responsive and attentive service to the people of Sacramento County.”

Doug Kudlick, IT Manager, County of Sacramento

He continued: “We have strict timelines for issuing certain kinds of benefits—sometimes as little as three days. The inefficiencies created by paper meant that staff had to work very hard to hit their deadlines and ensure that assistance reached those who need it on time. We wanted to help caseworkers handle their workload more easily, so we could connect deserving citizens to our support services faster.”

Solution

To drive more efficient ways of working with information, Sacramento County embarked on an ambitious transformation program—joining forces with Kofax Platinum Partner Western Integrated Systems to digitize mountains of paper files, using Kofax® Capture® and Kofax Transformation™ software. The county also introduced a centralized service center for managing DHA case workload, empowering caseworkers to collaborate on different cases.

Jerry Gray, IT Manager at Sacramento County, commented: “Documents are no longer tied to a single location or caseworker. Employees from any location can access the information they need to make the right decisions and keep cases moving along. It makes for much more flexible, efficient processing and timelier delivery of benefits to citizens.

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“We’ve also achieved remarkable cost savings since moving to electronic content. We estimate that we were spending at least \$2 million a year for shipping, processing and storing all our paper files; now we’ve completely eliminated that expense, which is just fantastic.”

Not content to rest on its success, the County has recently decided to take the next step on its content management journey. As part of a wider strategic program aimed at improving the client experience, Sacramento County plans to extend document capture and process automation to customer-facing employees in the field, using Kofax Front Office Server™.

Doug Kudlick elaborated: “We realized that shipping all our paper documents to a central hub for scanning and processing wasn’t the most efficient approach. This is mainly due to the sheer volume of content we work with—the DHA alone scans around 15 million document pages annually, and the rest of the County performs about 5.6 million scans. It can take up to three days to transport documents to our processing center and enter them into our core content management repository—a delay that we simply can’t afford, especially when it comes to more urgent cases.

“We also wanted to introduce more automation around document sorting and classification. At the moment, scanning operators have to manually sort through the files and separate them into different categories depending on document type, then place barcoded separator pages between the different batches of documents before scanning them. And when front-end workers need to retrieve the electronic images, they can only search down to the document level, which can be an issue when someone is just looking for a specific page buried within a very long document.”

He continued: “We wanted to shorten the time that elapsed between receiving paper documents from clients and entering them into our back-end systems. We also wanted to make it quicker and easier for teams to access the electronic content that they needed. Kofax Front Office Server proved to be the ideal solution for achieving these goals.”

Sacramento County will use Kofax Front Office Server to extend existing Kofax Capture and Kofax Transformation business processes to staff in distributed agency locations. The County is planning to roll out some 150 capture stations, which front-line teams can use to capture documents at the first point of contact with clients. The newly digitized content will then be automatically sent to Sacramento County’s back-end service center for processing and entry into content management systems.

In addition, the County plans to enhance its existing Kofax Transformation platform to automate document classification, separation and data validation work—helping operations teams work more efficiently.

Results

Once the enhanced document imaging model is in place, Sacramento County will be able to capture and process information more efficiently and accurately than ever before.

Jerry Gray: "Enhanced document management will also benefit departments that work with large collections of very detailed documents, such as the Department of Transportation. Their civil works and construction teams keep a host of drawings, plans and other documents detailing work that has been carried out, and they often need to refer to files that stretch back to many decades ago. With a better way of indexing documents, teams will be able to search for and retrieve the exact files that they need—right down to the individual page level. This means that people spend less time hunting down information and more time using that information to inform decisions and get work done."

A faster, more flexible approach to working with information will enhance the productivity of teams throughout the County, and make it more convenient for citizens to access the services they need.

Kudlick gave an example: "If a client submits an application and forgets to bring along a key piece of supporting documentation, such as a pay slip, our workers can process the information they have already received and once that client returns with the missing documents, they can easily capture them on the spot and everything will be linked up in our back-end repository in a matter of minutes—instead of waiting days for the documents to be processed."

The efficiency gains will help the County speed up document processing times, allowing departments such as the DHA to manage their workload more effectively and enhance service delivery.

"The new approach is all about making life easier for both our teams and the clients they serve," concluded Kudlick. "We'll be getting the right documents to the right people faster, so that they can serve clients more effectively—cutting down on the time that citizens have to spend at our agencies, as well as the time taken to deliver the benefits they need. We are looking forward to taking our electronic content management capabilities to the next level with Kofax solutions, and unlocking new opportunities to deliver even more responsive and attentive service to the people of Sacramento County."

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