neubus.

Capture, Store, Manage and Share

ELECTRONIC DOCUMENT STORAGE SERVICES IMPROVE CONTRACT ADMINISTRATION

BUSINESS PROFILE

The Administrative Services Development (ASD) department of the Texas Health and Human Services Commission (HHSC), Chief Operating Officer's (COO) division is responsible for establishing policies, procedures, and guidelines for the agency's Contract Oversight and Support (COS), Historically Underutilized Business (HUB) Program Services, Procurement/Requisition Services, and Grant Processing Oversight and Support Services Units. The department administers the review, approval, tracking, performance, and monitoring of a variety of business functions.

OPERATIONAL OVERVIEW

ASD serves as a centralized processing administrator and repository for all HHSC contracts. Each contract flows through the department to ensure that it is drafted with legal input, checked for budgetary and financial constraints, reviewed by representatives appointed by the Commissioner, routed to agency executives for signature and execution, and stored for future reference.

BUSINESS NEED

Historically, the Contract Oversight and Support process relied heavily on paper documents stored in physical files, requiring storage space and staff resources to manage.

"We had a huge repository room, where there was nothing but filing cabinets," said Geraldine Pavelka, Team Lead, COS/Grants Unit. "The contracts were stored by fiscal year. Whenever we needed to find one, we actually had to get up and go into the file room to search for it."

With contracts that are five hundred to one thousand pages in length, it had become a significant burden for staff members to locate specific files, flip through the documents to find what they needed, make copies, re-file the contracts, and return to their work.

Additionally, the agency had hundreds of thousands of pages of business-critical information stored on paper and needed a more effective way to make information available to internal customers – including program staff, contract and procurement managers, and other divisions.

In an effort to ease the paper struggle, the department purchased and began using a multifunction scanner that converted documents to PDF. ASD leaders hoped the hardware purchase would enable employees to save files on their system for routing to individuals as needed; however, they soon found that the agency's document structure and flow proved to be too complex to work with a standardized process.

SOLUTION

ASD Business leaders sought help from Neubus to image the agency's contracts. Neubus Business Analysts worked with ASD for over six months to develop a plan and protocol for scanning and storing records on their system, ensuring that they understood not only the structure of the agency's files, but also what it would take to implement a solution without disrupting ASD's daily operations.

Based on concerns about document confidentiality, combined with staff members' need to access documents sometimes hourly, Neubus developed services that included on-site scanning and a 24-hour turn-around time to have documents available online, as well as a 4-hour emergency service to be used as needed.

Neubus matched the electronic file structure with the physical file structure, adding electronic bookmarks – similar to tabs in a file folder – to the scanned documents. This ensured that the digital contracts were easy for agency staff to view, update, and pass along.

Neubus also worked with the ASD IT team to implement an Application Programming Interface (API) between the Neubus ESD system and Health and Human Services Contract Administration and Tracking System (HCATS). HCATS is a workflow application that serves as a repository of information related to procurements and contracts; it is used by HHS System agencies to track contracts. Putting the API in place ensured that ASD employees do not have to login to both the Neubus and HCATS systems to work on a contract. Instead, they can work in HCATS and seamlessly access a contract's associated images and correspondence.

With Neubus services in place, all contracts that come through ASD are stored electronically, from document creation in the agency's database to approval, execution, and start date. Agency staff members track the contracts throughout this process, updating their status in the system and adding related correspondence, new amendments and renewals as they are received.

BENEFITS

BETTER ACCESS TO FILES

Because files are scanned on-site, they are available for access within 24-hours. With the Neubus and HCATS systems connected via an API, users can work in HCATS and access the images they need, rather than jumping between multiple software applications. Additionally, multiple staff members can access files simultaneously.

"All we have to do is go into HCATS and the files are there," said Pavelka. "It's like having access to a filing cabinet that holds every contract, without ever having to leave our desks."

MORE EFFICIENT USE OF RESOURCES

The system has helped ASD use resources more efficiently. For example, the space that was previously used as a file room has been converted to office space. "It houses three people," said Robert Hall, ASD Director.

ASD staff members can work more efficiently with other departments, as well. "When we get a request from our open records area, we pull up the imaged document and place it in a common folder that they have access to," said Pavelka. "The same applies if our legal counsel needs a copy of the original contract to work on an amendment; we just put it on a shared drive."

SHORTER PROCESSING TIME

The Neubus solution reduced time required to search for contracts. "As long as you know the contractor name or contract number, you can enter that in HCATS and find your contract quickly and easily," said Pavelka.

INCREASED RELIABILITY

Unlike previous solutions tried by the department, Neubus services enable staff members to find the files they need at all times.

"We don't have to worry about any technical difficulties with our multifunction device being down," said Hall. "And, if our own system is down from time to time, we can go straight to the Neubus' Electronic Service Delivery (ESD) system and access their data as a back-up file."

LOWER COSTS

The Neubus solution enables ASD to administer contracts for a lower cost than they would incur with physical files.

SUMMARY

"The cost of imaging and storage on Neubus is nominal, said Hall. "And there are no repeated or ongoing costs of storage."

Neubus services have enabled ASD to capture and store contracts electronically, saving time and allowing the department to use resources more effectively.

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