



Monroe County DHS

INSTREAM CASE STUDY

Monroe County, Department of Human Services, is in the Finger Lakes region of New York State. The DHS team works to provide health and human safety services to members of their community.

The Problem

Monroe County has been an InStream partner for many years. They purchased ApplicationXtender content management solution and Formatta e-forms solution in 2014 to assist with their job application process. InStream also completed a large offsite scanning process of all employee records for Monroe County. In 2018, the Monroe County Department of Human Services (DHS) reached out to InStream because its adoption and daycare departments were overwhelmed by vast quantities of paper records.

DHS is an umbrella agency that is responsible for providing public assistance programs to the county including social security, social affairs, human resources, and welfare. The building is upwards of 7 floors with various records organized by year and then in alphabetic order, stored in different places throughout the building. Adoption and Daycare Employees struggled to locate and send records to respective parties promptly. It took hours to days to find and send a record. Monroe County DHS felt overwhelmed by the prospect of backlogging decades worth of documents.

A challenge for InStream is the fact that Monroe County employees still required access to the documents while they were being digitized, creating a need for specific processes for the backend scanning. When you take away their paper, it is a challenge. We had to overcome it by creating a process so employees could get to the records quickly. The permanent records housed in the building for adoption, divorce, and custody were the only copy. It was crucial to determine an intelligent plan to create secondary copies that benefited all parties and kept the original documents safe. If the records were damaged during the digitizing process or through a natural disaster such as a flood or fire, Monroe County DHS would be liable for a lawsuit.



Over 3 Million Images Scanned



Saved time and money for Monroe County by scanning on-site



Less errors and more accuracy

> continued

The Solution

InStream won the contract to provide digitizing services for adoption and daycare records on-site at their location. This was a unique situation since records are usually sent to InStream production facilities to be uploaded. Monroe County adoption and daycare departments applied ApplicationXtender with 20 concurrent user licenses as well as a 1.2 million Bundle Capture with PSIGEN.

There is a three-part plan to help Monroe County maximize space and efficiency while digitizing documents.

InStream offered to:

- Take care of all backend scanning for the Adoption center on-site.
- Teach small volume scanning for Daycare employees.
- At minimum, return every six months to ensure that all data is up-to-date.

The goal was to capture and digitize all backlogged documents in the Finance, Adoption, and Daycare departments while setting up a process for future input. InStream would establish free space within the office by taking all documents to a safe storage area away from the elements and retrievable if needed later.

A plan for Day Forward scanning was created, allowing the InStream team to start digitizing documents without disrupting the daily schedule of Monroe County staff. InStream created an inventory of documents to be captured and uploaded in scheduled segments on-site. This way DHS staff would know the location and timeline of each document if it had not yet been uploaded into the system. If a staff member needed a document while it was being digitized it could be returned to its assigned location within 15 minutes. InStream took care of all backlog while setting up a system to teach Monroe County staff how to complete future scanning without assistance. Small volume scanning such as an Inspection report, can now be handled by individual employees and uploaded to ApplicationXtender.

The Results

InStream scanned and safely stored nearly 3 million documents for Monroe County's Adoption and Daycare Departments. Significant space in their office has been cleared, allowing employees to feel less cluttered while retaining access to the data they need through the ApplicationXtender portal. One of the largest benefits of digitizing records is the quality of time management. Records can be procured in a matter of minutes, helping to improve the speed of processes. Adoption and Daycare services have reported an increase in efficiency and quality of workflow within their departments since partnering with InStream. Communication times are greatly improved, allowing for faster decision making and better outcomes for those requiring DHS services. Having secondary digital copies of all documents creates peace of mind and reduces liability against damage or loss of the originals. Since InStream returns to Monroe County regularly each year, staff do not have to worry about returning to their prior state and once again being overloaded by paper documents.



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