Small County Accelerates Process Modernization with OnBase

Duchesne County, located in the northeast part of Utah, serves a population of over 19,000. The county's local government is composed of 24 departments and 172 dedicated workers.

OBJECTIVES

- Decrease Reliance on Paper Documents
- Centralize Control of Documents
- User-friendly System for Non-IT Workers
- Accelerated Processes
- Leverage Existing Technology

RESULTS

- Significantly Reduced Paper Use
- Streamlined Document Retrieval Process
- Easy-to-Configure System that Empowers Non-IT Users
- Streamlined Processes Across Departments
- Easy Integration with Line of Business Application
- Enterprise-Wide Platform

The Challenge

Cristina Neilson, Electronic Records Management Database Administrator at Duchesne County, knew the county and its dedicated workers deserved more than what their static document management system could provide. Security was almost non-existent. The system was also very cumbersome to use, which led to several big problems. Searching and retrieving documents was extremely time-consuming. Employees regularly lost documents, even mere minutes after entering them. Although the existing system stored their documents digitally, the offices still depended heavily on physical documentation because it was easier and more reliable than the system itself.

Knowing it was time for a change, Cristina began searching for a new system. She needed a tool that could do more than simply store documents. It needed to have enterprise capability so all the County's departments could benefit. She ultimately discovered OnBase and was impressed by its incredible automation capabilities. To learn more, she and her team met with authorized OnBase solution provider, Naviant. When Naviant demonstrated all the things OnBase could do, Cristina knew it was precisely what her County needed, including the potential to make her employees' jobs more efficient and enjoyable.

> "When they showed us the Workflow, the WorkView, and the Unity Forms, we got really excited- I got really excited!"
>
> *Cristina Neilson, Electronic Records Management Database Administrator*

With Naviant as their guide, Duchesne County began to deploy OnBase across many of its departments.

The Solution

INFORMATION WHEN YOU NEED IT

OnBase has centralized all of Duchesne County's documents, which has streamlined the document retrieval process. Workers can find the documents they need with the push of a button. To everyone's relief, the County's days of lost documents are officially over.

SEAMLESS INTEGRATION TO LINE OF BUSINESS APPLICATION

As a small county, Duchesne County doesn't have that many systems, but they rely heavily on COINS, and they've been able to integrate it with OnBase. COINS is the line of business application used by everyone in the administration building for everything that they do. Among some of the duties they use COINS for includes running their taxing, appraisal, and recording programs. The County has been able to seamlessly integrate all of these programs with OnBase thanks to OnBase's easy integration.

ACCELERATED PROCESSES WITH WORKFLOWS

Duchesne County uses Workflows to streamline processes across numerous departments. A particularly transformative instance is the use of Workflows for the Board of Equalization (BOE). Three different offices use it, which allows them to keep track of each other's progress. Joann Evans, Duchesne County Clerk/Auditor, regularly uses the BOE Workflow. She said, "It is very structured and helps all of us who use it." Joann's office also uses additional smaller Workflows, which have enhanced overall efficiency and organization considerably.

FORMS MADE EASY WITH DOCUMENT COMPOSITION

Duchesne County has integrated Document Composition into OnBase for vital records. Document Composition is linked to the County's line of business application, COINS. When workers create a document, the relevant information is pulled from COINS, so they only must manually type in whatever information is specific for that application. This function accelerated the document creation process across departments, especially the Assessor's Office and the Clerk Auditor. Assessors use Document Composition in OnBase to create all its many letters and fill out other forms. The Clerk Auditor also uses it to create marriage license applications with ease.

PUBLIC ACCESS VIEWER: MAKING JOBS EASIER AND CONSTITUENTS HAPPIER

Residents now have the choice to browse minutes in OnBase, and the full-text search module allows them to find what they're looking for quickly. They can also elect to complete their forms online through Unity Forms. When it comes to tax matters, the County now posts prepayment coupons online for residents to print for themselves, rather than the costly process of mailing all 35,000 papers to residents. Giving residents these options has freed up time for government workers who, as a result, have been able to attend to more value-driven tasks, including providing excellent customer service.

The Difference

50% MORE PRODUCTIVE AND 95% PAPERLESS ASSESSOR'S OFFICE

Assessors now do all their work in OnBase, leaving them 95% paperless. This change has led to incredible time savings. In the case of one area that once took two years to appraise in the days of paper, since the implementation of OnBase, the appraisal process now only takes one year. Assessors also enjoy the time saver of pre-populating forms and the convenience of offline/remote access for fieldwork. Not only are they able to get more work done in less time, but it takes fewer people.

FASTER APPROVAL PROCESS

The Building Department has decreased the amount of time spent in the approval process thanks to Electronic Plan Review. Residents can complete all actions electronically or bring their building permits into the office. For the few residents who choose to bring their papers in, County employees can easily enter the constituent's information through OnBase and carry on with the approval process electronically. The result is significant time savings for both County workers and constituents.

> "What once took days, you can do in just an hour
> or two in one system, OnBase."
>
> *Greg Garff, Duchesne County Assessor*

STREAMLINED OPERATIONS WITH WORKVIEW

Duchesne County's Roads Department uses a WorkView application daily to keep track of the road repair cost. At the end of each day, all Road Department employees fill out how much they spent, what equipment they used, and how much material they used. A WorkView application then automatically brings all this data into OnBase. As a result, they can easily track projects and run reports to see what they spent on any given road. They also integrated ESRI's Collector with OnBase, which has helped the Road Department keep track of work orders in a highly efficient and organized manner.

> "I like that OnBase is user-friendly software and we can easily find the data we're looking for."
>
> *Ben Henderson, Duchesne County Roads Department Director*

DEPARTMENTAL COLLABORATION

By centralizing its documents in OnBase, Duchesne County has unlocked the ability to work simultaneously on the same work across departments. This ability has proven to be a real game-changer for Records and Assessors, in particular. Previously, the Recorder's Office was regularly behind in recording their documents, which led the Assessor's Office to get behind in doing their appraisals. Thanks to OnBase, as soon as the Recorder receives a document, the Assessor gets a notification, and they can access the document and immediately begin doing their work. This change has led to less stress for the Recorders and Assessors and happier constituents.

EMPOWERS NON-IT STAFF

Cristina will be the first to confess that while she doesn't have much experience with the IT world, this hasn't held her back. Because OnBase is easy to configure, non-IT staff like Cristina can develop and manage Workflows independently. Less reliance on IT staff means that the County can put their plans into action faster and enjoy the results sooner.

> "I don't have any programming background, and still, we've done everything we did. It's very easy to use, you have all the tools in the background to do anything you need to do. So personally, I think there's nothing they [users] could ask for that's impossible."
>
> *Cristina Neilson, Electronic Records Management Database Administrator*

FLEXIBILITY IN THE FACE OF CHALLENGE

When it comes to tax appeals, some years see an influx compared to others, but through it all, County staffing remains the same. With OnBase on board, however, Duchesne County is prepared to handle spikes of tax appeals with much greater ease. Since implementing their OnBase solution, the County faced a massive fire that burned over 56 thousand acres, destroying numerous structures in its path. But OnBase enabled the County's response to be agile in this time of need. Duchesne County Deputy Assessor, Sharon Smith, recalls, "We had lots of appeals and we were proactive about that, to help people through the burn, thanks to OnBase.

Maintaining Momentum with a Technology-Positive Culture

Cristina Neilson has a highly involved team behind her, and that's no coincidence. Her enthusiastic dedication to innovation has not only driven the County's success with OnBase, but it has inspired a technology-positive culture among County workers that embraces change. As Cristina says, "What also

matters is the people you work with because if people are not willing to embrace the technology, you cannot do anything. You cannot force someone to do something they don't want to do."

The County's technology-positive culture has motivated workers to play an active role in improving the County's OnBase solution. Workers across departments routinely come to her with ideas on how to improve various processes. Duchesne County Deputy Assessor Ginger Johnson said, "(Cristina) really did her homework on knowing how the system worked, she knew the ins and outs of this program, we can come to her with anything, and she will figure out a way for us to implement it." Continual improvement is the key to long-term process excellence. And, that takes an innovative mindset and team-wide cooperation.

Vision for Future Progress

Naturally, as a small county with a big vision, Duchesne County has plans and strategies for the future of its OnBase solution and its continued Digital Transformation. The County is currently very excited to be working on its latest project, which is adding the Unity Combined Viewer. Eventually, they plan to integrate with ESRI, re-design and improve "old" WorkView and Workflow applications, and integrate OnBase in all 24 County departments. The possibilities with OnBase are endless in Cristina's eyes, and Duchesne County is sure to continue to be a shining example.

Duchesne County OnBase Implementation Timeline

2015

RECORDER'S OFFICE
Imported Over 170K Records

ASSESSOR'S OFFICE
Scanned Over 50K Appraisals & Greenbelt Files

2016

ASSESSOR
Integration LOB
Appraisal Process

CHECK / AUDITOR
Marriage License Application

ACCESSOR / AUDITOR / COMMISSION
Board of Equalization

TREASURER
Board of Equalization

2017

BUILDING INSPECTOR
Implementation of EPR

ASSESSOR
Greenbelt Application and Audit Process

ROADS
Roads Cost Tracking

HR
HR Onboarding
Employee Evaluation

2020

ROADS
Redesigned and Improved Road Sign Inventory

EMERGENCY MANAGEMENT
Incident Expense Tracking

COMMISSION / AUDITOR / TREASURER
Grant Application Management

2019

ASSESSOR
Redesign and Improved BOE Application
Redesign and Improved Greenbelt Application
Primary Residence Application

ROADS
Redesigned and Improved Road Cost Tracking Application
Road Sign Inventory

2018

CLERK/AUDITOR
Improved Marriage License Application

TREASURER / RECORDER / AUDITOR
Delinquent Tax Sale

IT
IT Support and Inventory Application