

CASE STUDY

CHESTER COUNTY — PENNSYLVANIA



“ When our employees need a certain form, it’s easy for them to find it as they now know exactly where to look. It’s also simple for our citizens to go online and fill out forms. ”

Chester County is the first county in Pennsylvania to initiate a strategic planning process and has a AAA rating on its bonds from Moody’s Investors Service as well as AAA ratings from Standard & Poor’s and Fitch ratings. Established by William Penn as one of Pennsylvania’s three original counties, Chester County has been named by Forbes.com as one of America’s best places to raise a family and is ranked one of the healthiest counties in Pennsylvania by the Robert Wood Johnson Foundation and the University of Wisconsin Population Health Institute.

Quick Facts

Location: Chester County, Pa.

Products: Formatta web-based forms

Integration: PeopleSoft

Focus: County government

Departments: Countywide — including courts, emergency services, public health and human services, administration

Like most local government entities, Pennsylvania’s Chester County used to have thousands of paper forms relating to every kind of citizen-related service and process. Several departments implemented electronic forms products, but these were only used in individual areas. As Chester County has a centralized office for managing IT/IS applications, staff members recognized the need to also centralize and standardize forms management. After researching several options, they selected Formatta from Access.

“We needed a way to standardize how we request, create, publish and manage forms across every department in the county, and Formatta best met this need,” said Donna Ross, DCIS Area Manager and HIPAA Privacy Officer at Chester County. “Being a county government, we have a limited budget, and Formatta was the best deal for a solution that fits our needs.”

Previously, each department that had an e-forms product needed its own training and resources from the central computer department, creating what Ross calls “a support issue.” With Formatta, Chester County is employing a train-the-trainer approach where Ross shows a super user in each department how to use Formatta, and they then pass on what they’ve learned to colleagues.

“Formatta is easy to use and it has been simple for me to train other people,” Ross said. “I also find it simple to create new forms and updating existing ones.”

Before going live with Formatta, Chester County had some e-forms but they were spread across different systems, databases and applications.

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ACCESS ENTERPRISE FORMS MANAGEMENT

Before

Finding forms was a struggle, as hard copies and electronic versions were stored in many places

Administering e-forms products for different departments was time-consuming and made form requests, design and deployment a challenge

Tracking forms as they moved between people, departments and systems was impossible

Securing sensitive personally identifiable information (SPII) is difficult, and paper-based workflows make it hard to demonstrate compliance with federal and state regulations

After

Citizens and staff members have one place to go to get all of their e-forms

Centralized, web-based forms system makes administration easy and enables a standardized forms management process

Users can see who has their documents, what actions have been taken, and how long forms processing takes

Strong security features protect citizens' SPII and help support compliance standards

Having a single point of access for all electronic forms has made it easier to find them and extends the convenience of paperless requests to citizens across the county.

"When our employees need a certain form, it's easy for them to find it as they now know exactly where to look," Ross said. "It's also simple for our citizens to go online and fill out forms."

Simplifying and Speeding Business Processes

Chester County has hundreds of forms-driven processes, using web-based Formatta e-forms in 125 of them. One of these is the county's job application process. An applicant quickly finds the application form on Chester County's website and fills it in. They then attach a resume and submit the document electronically. The content is automatically routed to the relevant department and to Human Resources to build a new hire packet. Formatta also sends the data into PeopleSoft HCM.

The Public Health department uses Formatta for employee self-service. "If someone wants to request time off, they just open the form, quickly enter the details, and it's sent to their supervisor," Ross said. "If they get one level of approval but are still waiting on someone else to sign off, they can see exactly where their request is in the process."

The Emergency Services department is benefiting from web-based forms and the paperless processes they facilitate. When a court or other entity requests 911 call recordings, the District Attorney has to review the request. As Formatta supports Apple iPhone, iPad, Android devices and other mobile technology, he's able to pull up the request on his smartphone and either approve or deny it. In addition, the department uses Formatta to report new missing and wanted person forms.

Formatta is proving useful for processing citizen requests as well. If a group such as a Girl Scouts troop wants to schedule CPR training, they simply fill in a form on the County's website and are later contacted by e-mail or phone to set up the training classes.

"From missing and wanted person forms to CPR training to 911 recording requests, Formatta is helping us speed and simplify emergency services processes," Ross said.

The Human Services department uses Formatta to manage its monitoring process. In addition to filing online reports, inspectors send scores and remediation plans, when necessary, back to providers using Formatta.

Meeting Compliance Needs

It's not just Chester County's HR, Emergency Services and Human Services departments that are removing paper and complexity with Formatta. Ross has expanded web-based forms and paperless workflows to many other departments, including Health Services.

“Formatta is so flexible that we can apply it to every department. People are continually coming up with new ways to use it because they like knowing where their forms are, who has them, and what actions have been taken. It’s a great time-saver.”

Every cremation has to be authorized by the Coroner’s office. Before Formatta, this would’ve involved a time-consuming paper chase, but now, the funeral home submits an online request form, which Formatta routes to the Coroner for approval.

Upon review, the document is sent back to the funeral home and data is uploaded into PeopleSoft for billing. Nursing homes also send reports of natural deaths to the county Coroner using a similar, automated process.

With processes like these that involve sensitive personally identifiable information (SPII), Chester County must meet compliance standards for securing such data. As the HIPAA Privacy Officer, Ross is confident that Formatta helps meet security and compliance needs.

“With Formatta, we can make sure that sensitive data is only seen by those who need to see it and is protected from everyone else,” she said. “It helps us comply with federal and state regulations and protects our citizens when their sensitive information appears on documents that aren’t public records.

Getting Responsive Support and Planning for the Future

“BerkOne have provided great support for Formatta and I’ve been very pleased with how responsive and knowledgeable they are,” Ross said.

When we talked with Ross, she told us that the 125 e-forms that Chester County uses is a fluid number, as she regularly receives requests to convert more paper forms into electronic, web-based versions. As Chester County addresses the future needs of its citizens and staff, Ross sees Formatta as a valuable asset.

“Formatta is so flexible that we can apply it to every department,” she said. “People are continually coming up with new ways to use it because they like knowing where their forms are, who has them, and what actions have been taken. It’s a great time-saver.”



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