



Trusted System Mandate (CA)

In an effort to ensure every electronic document or record is a true and accurate copy of the original information received, [CA is requiring](#) that at least two (2) separate copies of the official document/record must be created on electronic media that meets all of the requirements of a Trusted System. This must be done before the original copy is destroyed.

Additionally, any agency that intends to destroy paper documents and rely on electronic versions instead must have a Trusted System in place. Essentially, what a Trusted System ensures is that official records cannot be altered, which becomes especially important when these documents are presented in a court of law.

The Problem

The goal of this initial project was to implement a fully compliant Trusted System process for accounting records containing Protected Health Information (PHI) and Personally Identifiable Information (PII) content. With the Trusted System mandate on the horizon, the County of Shasta wanted to have it in place well ahead of the mandate deadline.

The County also was seeking a solution to automate their invoice capture in an effort to streamline their internal processes. Their current processes were outdated and they needed a solution that could quickly capture and route information from invoices to the appropriate location.

The Solution

Western Integrated Systems consulted with the County's Health and Human Services Agency to address these issues, as well as other departmental processes and workflows that weren't fully compliant with the California Trusted System Mandate. Led by Senior Systems Architect and Lead Trainer Cheryl Young, training was conducted within the agency to identify potential process changes within non-compliant departments.

The Results

The final result was a Trusted Systems-compliant process that was not only adopted by the Health and Human Services Agency, but also approved by the County Auditor-Controller, County Counsel and made available to all 28 departments within Shasta County. This allows all 28 departments to be compliant with one of the strictest mandates in the nation for managing electronic records. What software drove the results? FileBound, of course.

FileBound for AP & Invoice Processing

Instead of managing and routing invoices physically or by email, FileBound's workflow and document automation solution makes processing invoices and payments an easy, straightforward process. By automating time-consuming and/or manual duties, AP professionals will spend less time chasing paperwork and confirming approvals. That will free them up to spend more time on valuable tasks that further the cause of your organization—all while improving accuracy and efficiency.



"The County's auditors absolutely loved the FileBound system because of the transparency and the ability to find what they need, when they need it."

--Michael Conti

County of Shasta
Technology Manager &
Privacy Officer (Health &
Human Services)



Feedback from County of Shasta

We asked Shasta's Technology Manager for his opinion on how FileBound has helped the county...

Background

Shasta's Technology Manager and County Privacy Officer Michael Conti was instrumental in locating a solution for the Health and Human Services Department. With invoices piling up from manual processes, coupled with a state mandate, Western Integrated Systems worked with Conti to locate a solution that could encompass all of the county's departmental needs. The solution was FileBound, which would provide a means for the county to archive medical records and accounts payable information in a system that was compliant with California's Trusted System Mandate.

Efficiency

Shasta has also seen FileBound improve internal processes that has helped streamline many operations for the Health and Human Services Agency. "We have a process that requires any record sent for scanning to be uploaded to FileBound within 48 hours of receipt," said Conti.

"This makes a huge difference for staff needing to coordinate care with clients, tracking authorized service for clients, communicating current labs with our psychiatrists—and we can store release information in the client chart for others to view."

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--Michael Conti

(Technology Manager for

Shasta County HHS)

Audit Trail

After a recent audit, Conti reached out to Western Integrated Systems to pass along some praise of the system.

"The County's auditors absolutely loved the FileBound system because of the transparency and the ability to find what they need, when they need it." For Shasta, the normally laborious experience of an audit was refreshingly painless, another testament to the versatility and functionality of FileBound.

Rapid Adoption

Driving the rapid adoption for staff was FileBound's ease of use, even for the non-technical or new user. "New employees frequently feel stressed out about using a document management system," said Shasta HHSA's Technology Manager Michael Conti. "That stress quickly dissipates as FileBound is not difficult to use." Even if a new employee as never used a document management system, FileBound's intuitive design accelerates the learning curve.



FileBound

Technology Solutions for Government

More paper. More problems.

Both local and municipal government use an inordinate amount of paper, often only rivaling large corporations.

Legislative bills, court documents, reports, correspondence—the paper stacks up quickly.

That's just one department though. Multiply that by all the departments in government and the stacks quickly start to resemble a mountain range.

Government and document management systems are a match made in software heaven. Soulmates if you will. They need each other to thrive.

Local government is also the quintessential home for workflow. In today's world, documents either move by hand or by email—which consumes a vast majority of administrative personnel's time if these processes are still manual.

FileBound's Workflow feature automates this movement of paperwork, automatically routing documents and reminders. Unlike administration, FileBound never takes a holiday either.

So stop printing thousands of copies. There is a better way—just send it electronically and enjoy the benefit of sequential routing that records each reviewer's changes as they are made. That way, you control the versions so everyone is working on the most current. It also tells you exactly where backlogs exist, so you can get your workflow "flowing" again.

Overcoming Multiple Software Applications/Storage Systems

Another strain on government resources is the duplication of information—which often is a result of staff using multiple software applications to submit data.

Since FileBound can integrate across multiple applications, it unifies your systems so all offices and/or departments can access information when they need it.

This can help eliminate the duplication of information across multiple areas of government.

Hardcopy items can also be easily entered into the system via a scanner and then electronically filed with the appropriate subject for easy accessibility.

Search and retrieval is a snap compared to hunting through a physical file cabinet or searching multiple databases, in multiple agencies.



DOCUMENTS GOVERNMENT CAN MANAGE WITH FILEBOUND

STATE LEVEL

- Bills
- Resolutions
- Executive Orders
- Journals
- Press Releases
- Public Laws
- Regulations
- Court Decisions
- General Laws

CITY/COUNTY LEVEL

- *Employee Handbooks*
- *Emergency Manuals*
- *Technical Manuals*
- *Birth Certificates*
- *County Licenses*
- *Diplomas & Transcripts*
- *Marriage Certificates*
- *Divorce Certificates*
- *Correspondence*
- *Passports*
- *Immunization Cards*
- *Police Clearances*
- *Death Certificates*
- *High School Certificates*

OTHER DOCUMENTS

- Building/Planning Permits
- Council Minutes/Agendas
- Finance/Taxation Docs
- Fire Department Maps
- Public Works Records
- Property Records



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