



## FileVision makes document management elementary for Cholmondeley Children's Home in New Zealand

*Social services provider chooses document management, imaging and workflow solution to manage referrals, admissions and scheduling*

### Customer Profile

Cholmondeley Children's Home is a registered Child and Family Support Service located in Christchurch, New Zealand, which provides a safe, short-term haven for children between the ages of 3 and 12 whose parents are unable to care for them. Its mission is to provide quality short-term residential care for children in need and support for their families.

Cholmondeley is a non-denominational home and forms an important niche in the social services available to troubled families and those with temporary support needs such as emergency and respite care. Each night, the home cares for up to 30 children from Christchurch and the surrounding Canterbury districts. There is major emphasis on transitioning children between the home and the next stage in a child's journey, foster care for instance.

The home was gifted to the people of Canterbury by Hugh Heber Cholmondeley in 1925 to ensure that the community's children and future generations of children would always have a place to go in times of crisis.

### Business Case

Cholmondeley is a charitable trust administered by a board of trustees who act on a voluntary basis. In order to survive, the home relies on voluntary donations, membership subscriptions, parent donations, fundraising and grants from the Canterbury community. Since Cholmondeley and the associated outreach services are dependent on funding from the community and government, like many non-governmental organizations, the home struggles to keep adequate government funding.

With 24-hour care, the home employs 25 staff, including children and family workers and administrative staff. It installed its first simple computer network two years ago, and until FileVision, much of its record keeping was paper based.

Recently, it became clear that the home needed a better way to handle its paper-intensive processes and to find and extract information. Verifying applications for funding, particularly to Government agencies, requires much higher levels of flexibility and accountability than Cholmondeley could provide from the existing paper-based system.

### Solution

Pat Nolan, Cholmondeley's General Manager, consulted with systems integrator Fraame Solutions, Ltd. who recommended the FileVision document management, imaging and workflow solution. For document intensive businesses, FileVision is the first to combine information and document management with imaging and workflow into one integrated solution.



*Located at the head of Lyttelton Harbour in Governor's Bay, Cholmondeley has been improving the lives of children and their families for almost 80 years.*

Cholmondeley chose FileVision to manage its referrals, admissions, and scheduling. The system also assists with compliance - a vital part of accountability for government funding. In addition, FileVision provides the home with important information (or data) trends.

"We took the time to look at what we had, and what we wanted. We gave Fraame a picture of what we needed to achieve by melding together our existing electronic database and paper-based processes into one simple to use system," stated Pat Nolan.

Fraame installed FileVision at Cholmondeley and within a week, they were up and running and the staff was fully trained to use the system.

### Benefits

Pat explains that by being able to search any field, Cholmondeley is able to quickly and easily answer questions that until now would have taken hours of scouring through paper records.

"For example, if a government agency wants to know how many of our children have ADHD, we use FileVision and have the answer almost instantly. We couldn't do that before," she says.

FileVision provides a central repository for Cholmondeley to enter and track all the pertinent data on each child enrolled in the program. This includes the filing of notes and tracking of actions. Relevant staff can access case notes when they need them, without the risk of lost or misplaced files. The admissions form, care plan documents and discharge papers are attached to each child's record in FileVision, making it



much easier to process admissions, ongoing care and discharges.

The care plan is filed separately within the child's individual file. All the relevant documents can be shown for each child and case workers can simply retrieve and view what they need.

Another plus is easier management of admissions. Cholmondeley has children with a range of ages and needs, and must ensure there is a comfortable mix for the children. For instance, they can only accommodate a certain number of infants and special-needs children at any one time. FileVision captures all the important data on each child and provides reporting that allows them to track how many children they have, what their ages are, along with their risks or needs assessments, making this process faster, simpler and easier.

As the system was implemented, some existing paper files were scanned in. However, rather than do a complete back file conversion, Cholmondeley has since decided to scan in existing paper files as they are needed. From this point forward, Cholmondeley will enter information and store documents for all current and future children who come to them.

"We absolutely looked for the best value for our scarce resources, and this is already proving to be very cost effective. I expect it will pay for itself within a year", states Pat Nolan.

### Training and Implementation

As implementation started, there were a few changes and some improvements suggested by the Fraame team. Because FileVision is easily configured to any business' existing needs and processes, the changes were easily implemented and they had the system up and running smoothly in short order.

"When the FileVision/Fraame team came here, they worked alongside us and helped us understand the changes we needed. They were extremely professional and every piece of paper and information was ready at the right time, so we knew exactly what was happening, why and when, making the transition very seamless."

For Pat, who had previously experienced the difficulties that can be involved in introducing new computer systems, it was an amazingly simple experience. "We have 10 to 12 staff who use the system and another 20 including our on-site school accessing it for child information. They were all working on it happily by the end of the first week. The FileVision manuals were clear and easily followed. And FileVision provided on the

job training which is perfect for us since our resources are limited," she says.

### FileVision Benefits

- Track data trends for reporting purposes
- Create a virtual file for every child (or client)
- Streamline processes and increase efficiency
- Reduce overhead costs through elimination of physical storage space
- Keep administrative costs low

### Future Plans

In the near future, Cholmondeley plans to implement FileVision for employment records including information about staff training and professional development, doing away with the current paper process.

The children's home will also use FileVision to extract data and files to back up the grant and contract application process. This will help them in securing additional future funding from the government organizations that support them.

### About Fraame Solutions, Ltd.

Fraame Solutions offers business solutions, particularly in the health and social care services sectors. Established by Gavin Wright, the chair of the New Zealand Health IT Cluster, Fraame has offices in Christchurch and Sydney.

### About FileVision

FileVision is a global software company that develops information relationship management software. Our solution, FileVision, enables organizations to bridge the gap between digital content and paper documents by easily and strategically creating relationships between important, disparate pieces of information. Government, healthcare and financial services organizations worldwide rely on our technology to help them intelligently link and match documents to important data objects such as people, companies, processes and assets, resulting in improved communications, enhanced customer service and immediate access to information and relationships within the data. FileVision is headquartered in Atlanta, GA with offices in the UK, Australia and New Zealand. For more information, please visit us at [www.filevision.com](http://www.filevision.com).



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