

# WinDIP is more than an EDM for Portsmouth Hospitals NHS Trust



## Transition to a paperless office saves space, boosts productivity, enhances compliance and cuts costs

When the Portsmouth Hospitals NHS Trust's HR department had to move to new premises, their challenge was how to deal with the 75 shelving units holding their paper records. They decided to implement an electronic document management solution and transition to a paperlight working environment.

## Paper documents were hogging office space and hindering productivity

Most of the physical files were current employee records, held in some 8,000 manila folders. While these have to remain accessible, having them in paper form was both cumbersome and inefficient and took up a lot of space. There were also compliance issues, as office moves would have meant documents being moved around in a relatively unsecure fashion between locations.

Reliance on physical documents also had a negative impact on staff productivity. Paper files can only be used by one person at a time – creating inefficiencies while staff wait to use them. Time was also wasted hunting down files hidden on colleagues' desks.

Dealing with the regular personnel movements in and out of the Trust is a key aspect of the HR department's work, and here paper documents were a significant burden. When somebody applied and was offered a position through NHS Jobs, HR staff would photocopy their ID and other documents and start a paper file. If that individual joined the Trust, the documents would have to be scanned and uploaded to the NHS Electronic Staff Records (ESR) system. This created a substantial filing backlog that was particularly acute round the peaks triggered by the annual summer intake of junior doctors.

## WinDIP eliminated storage problems and streamlined administrative processes

Portsmouth chose Civica's WinDIP EDM system to facilitate the transition to paperless working for two reasons. First, WinDIP was already being used within the Trust in a clinical setting. Secondly, competing systems were either too expensive or were Cloud rather than server-based which was unacceptable to the Trust.

Civica started by scanning around 2 million individual images from those 8,000 current employee folders. The result? 75 shelving units were reduced to 10. In the event, the HR department had to move twice in 3 months and Alison is clear that this was only feasible because of the introduction of the EDM. "It would have been an absolute nightmare if we hadn't been able to go electronic."

However, the back-scanning process was only one piece of the puzzle. Custom SQL queries mean that data can be taken directly from ESR and linked with WinDIP. Scanning profiles were created to capture documents submitted by job applicants, so ID and other documents are captured as they are provided, then held in an electronic file on the server before going into WinDIP when employment commences. The benefit of this to the HR staff according to Alison is that "we're not creating those backlogs of work." This is particularly significant during the annual junior doctor rotation in the summer.

**"We already had some documents stored on CDs. We needed to import those into the system, we needed to bureau scan the existing records in the paper files and then go live in a paperless environment. Basically, we needed a system to join the three parts together."**

Alison Welstead - HR Administration Officer,  
Portsmouth Hospitals NHS Trust



Converting **8,000+** files to WinDIP saving **space** and **time**.

## The benefits of WinDIP

- ▶ Increases staff productivity and maximises resources
- ▶ Reduces peak workload, especially during annual doctor rotation
- ▶ Decreases storage and archiving costs
- ▶ Cuts stationery, toner and other materials costs
- ▶ Bolsters regulatory compliance through improved document security
- ▶ Reduces risks of documents going astray
- ▶ Cuts risk of errors in document processing and filing
- ▶ Improves audit capability while minimising audit preparation time

### WinDIP transformed the HR department's working practices

The benefits for the Trust of moving to a paperless environment are far more than simply solving a storage problem.

Most obvious are the time and resource savings from staff no longer having to handle paper documents. Multiple users can access electronic documents simultaneously and there's no more hunting around the office for missing files. As Alison puts it, "We're no longer hearing 'has anybody got this or that file?' around the office." And if someone needs a document copy, they receive it electronically rather than somebody having to photocopy and deliver it. The positive impact on productivity is clear as staff are freed up to work on more value-added tasks. Alison says: "The system keeps them at their desks more as they don't need to go to the filing room to obtain a file."

There are cost savings on top of this. Paperless working means no future archiving costs, and office space requirements are reduced as shelving is eliminated. Stationery costs have also dropped, as there is no need for physical printouts and a significant reduction in the amount of photocopying.

The audit process has also improved with the adoption of WinDIP. Auditors might ask to see physical proofs, such as the authorisation to advertise for a job or ID records. These are easily accessed through WinDIP. Portsmouth also uses the 'sticky note' function available in Adobe PDF documents to allow them to check who scanned the documents, who checked them etc., providing the required audit trail.

There are positive security implications as well. HR has had to work from several different locations and couldn't have done that as effectively if they hadn't been paperless.

Alison summarises the impact on the department:

**"Having all those documents held electronically has transformed staff activity on the recruitment side. We don't have to send staff into the archive 'black hole' to file bits of paper. Tracking them amongst 50 staff could be difficult."**

