

## PA Governor's Correspondence Tracking Woes Eliminated

### About The Client

*An important, albeit time-consuming, task for any Local or State Government is to be responsive to the inquiries of their constituents. The Governor's Correspondence and Scheduling Office handles all of the incoming mail and email addressed to the Governor for one of the largest states in the country, the Commonwealth of Pennsylvania.*

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### The Business Challenge

The Governor's Correspondence and Scheduling Offices receive hundreds of letters and emails every single day from the 12 million residents across the state of Pennsylvania. This correspondence pertains to topics as far flung as taxes, state road conditions, scheduling requests, and other issues.



The staff of the Governor's Correspondence Office work with over 80 agencies and legislative offices to provide expedient replies to all constituent inquiries, aiming to keep within a two-week response window. Over the years, their task became increasingly difficult as mail volume grew, and as the technology of their existing system aged. The 12-year-old document management system was built on proprietary software and did not have the capability to deal with the exploding numbers of email inquiries being received.

Additionally, with fax being the main form of communications to and from the state agencies, integrated fax support was a critical component of the Correspondence Office's operational workflow. Unfortunately, their existing system's fax server was no longer supported by the software vendor, and the system could not work with a recently installed centralized fax server.

### Strategic Actions

The Correspondence Office wanted to move away from their old system to a Microsoft SharePoint-based solution that is easy to maintain and would enable electronic (rather than fax) collaboration with their supporting agencies. The system needed to integrate with a centralized fax server, utilize the web for document distribution, and support email. The client also required full data and image migration from the existing system.

### The Solution

The Company selected an authorized INDICIUM reseller to provide an integrated and collaborative solution to meet their needs. By utilizing **INDICIUM Correspondence Management for SharePoint**, from INDICIUM Software, Inc., and MS-SQL database for the system underpinnings, the Governor's technical support staff were able to maintain control over the design and setup of the system. Full integration with the centralized fax server enabled seamless inclusion of fax information within the repository, while the incorporation of web access and email support greatly lessened the reliance on fax as the primary means of information sharing between the Correspondence Office and the agencies.

The new workflow in the Correspondence Office begins with a staff member sorting constituent mail from the rest of the incoming paper mail. This mail is scanned using Fujitsu document scanners and the images are added to the SharePoint document repository with the following meta data: date, log number, status ("open"), and the name of the internal staff member to whom it is assigned for follow-up.

The assigned staff member views the image from their work queue, classifies the correspondence, and determines if they should handle the response themselves, or reassign it to another staff member or outside agency for follow-up. When a staff member responds to the inquiry, they use the MS-Word mail merge to create and send a response letter to the constituent. A copy is stored in the document repository, the status is changed to "closed", and the item is removed from their work queue.

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If the correspondence is reassigned to an outside agency, the agency staff can simply access the inquiry in their private work queue on the web and provide an appropriate response letter to the constituent. Within the **INDICIUM Correspondence Management** environment, they simply drag & drop a copy of the response document into a “Response Folder”, where it is automatically added to the document repository, the status is changed to “closed”, and the item is removed from their work queue.

At any time, the staff can see the full history of correspondence with a particular constituent or about a particular topic.

### The Benefits

- > Improved efficiency in operational workflow within the Correspondence Office and out to the agencies
- > Elimination of manual processing of agency responses
- > Overall time savings in providing responses to constituents
- > Reduced costs for system utilization and maintenance
- > Less reliance on fax capability
- > Web-enabled access
- > Full email support
- > Better analysis and reporting capability

### Technologies Used

- INDICIUM Correspondence Management System
- INDICIUM Capture
- MS-SharePoint
- MS-SQL Server
- MS-Office

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### About INDICIUM Software, Inc.

INDICIUM Software, Inc. is a leading provider of document management and workflow software products and solutions to manage documents electronically and automate business processes. Its products are distributed through a network of solution providers to clients in financial services, healthcare, government, manufacturing, utilities, and other industries.

For more information, please visit [www.indiciumsoftware.com](http://www.indiciumsoftware.com).

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