



Document Management Can Save Your Funeral Home Staff Time

This is the first article in a three-part series that will take a look at the benefits of document management services. The next two articles will focus on money savings and increased compliance.

There is a buzz in the funeral industry these days about document management. But, do you really know what it is? In its simplest definition, document management is the process of managing documents and other forms of information, such as images from creation to storage to its dissemination. It also involves the indexing, storage and retrieval of documents in an organized method. Document management can make a difference in your funeral home by offering time and money savings as well as increased compliance.

Time Savings

In every survey taken over the last 20 years, managing paperwork falls in the top ten time-wasting activities. Think about your daily activities: How many times do you get up, go to the file cabinet, retrieve a file (if it isn't on someone's desk or at an off-site storage facility), get the information you need, make a copy and then replace the file? Once? Twice? Ten times? Each time you or your staff perform that exercise, you're using up valuable time.

With a document management system, you can realize tremendous time savings as soon as you begin scanning in your files and storing them electronically.

Documents are immediately available.

Instead of the scenario above where your staff gets up to find files, with document management they have access to those documents from their desks. They can find files using index values that are assigned during scanning or even with a keyword search.

Misfiled documents are a thing of the past.

If a piece of paper is misfiled in a file cabinet, it's almost impossible to find. But with a keyword search, you can find just about anything. If you are searching for all of the files associated with a specific person, for example; by typing "Susan" and "Smith" into your keyword or index value query, you can find all of the documents for Susan Smith. It doesn't matter when or where the documents were scanned into the system.

"We have files dating back to 1987, so we are starting with our oldest files first and are currently scanning them into our document management system," explained Kimmy Turner of Florida Mortuary Funeral & Cremation Services in Tampa, Florida. "Knowing that we can find a file using a keyword search or date range is comforting, because there are so many documents involved and they are currently stored in a variety of places."

Files can be accessed anywhere.

Funeral directors need to be available 24 hours a day. Why shouldn't their records be available at all hours too? With a web-based document management system, you or your staff can pull up a file or contract from your hotel room in the Bahamas (if you're lucky enough to get a vacation this year) or from your home office at 3 a.m. No more driving to the office to pick up documentation for the next morning's tasks.

Documents can quickly be emailed.

How many times have you gotten a call from a family member requesting a copy of a death certificate? Typically, that would involve finding the certificate, making a copy and faxing or mailing it out. Not so with a document management system. Most systems on the market these days allow users to retrieve a document and then instantly email or fax it out.

Document management systems can integrate with other software programs.

If you have an accounting program or contact management system, you can easily integrate it with your electronic records. Instead of having multiple programs running, you can use hot keys to pull up the documents based on a name or number in your index values, or it can be truly integrated so that you can scan and retrieve right from your accounting software.

Multiple locations can view documents simultaneously.

Many of you have more than one location. How convenient would it be to have one central repository for all of your documentation? That could be case files, pre-need contracts and even human resource paperwork. With a document management system, you can easily store all of your records online and make them available to your entire staff and if there is a document that several people need to refer to at the same time, they can easily pull up the document on several computers.

Whether it is your time or your staff's time, any time savings easily translates into money savings, which will be fully explored in the next article in this series.

Document management continues to grow in popularity in all industries. Leveraging the power of the Internet, you can reorganize the paper documents in your funeral home and create a system where information can be found with a few keystrokes.

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