



## FileVision Lays a New Foundation for the Charlotte Housing Authority

*Information Relationship Management System makes Section 8 Housing and Real Estate Development Groups More Productive*

### Customer Profile

The Charlotte Housing Authority (CHA) is a non-profit real estate holding company. It serves Charlotte, NC families for whom conventional housing is unaffordable. CHA's mission is to provide families with safe, decent and sanitary housing.

### Business Case

CHA is made up of several departments with various responsibilities, all languishing with massive amounts of paper documents and processes. Real Estate Development and Section 8 Housing departments in particular were having difficulty with storage and retrieval of documents.

One of the main reasons CHA decided to purchase an information management solution was storage. They were simply running out of room to file paper documents. More importantly, they wanted to make document retrieval and review simple for employees who did not have immediate access to the files. This could eliminate the cumbersome task of the file clerks physically pulling folders and checking them out and back in. With four other departments including Modernization, Accounting, Procurement and the Executive Committee needing a solution to their paper nightmare as well, CHA decided it was time to find an affordable and comprehensive solution.

CHA's IT department called on long-time associate and solution partner, BankSys Management Inc. (BMI) of Duluth, GA. BMI is an Authorized FileVision Reseller. Although the non-profit agency looked at several other systems, six out of seven departments within CHA chose FileVision over competing solutions.

Ralph Vestuti, Director of IT for CHA, stated, "Employees liked the graphical interface and could easily identify with how the FileVision filing structure is set up to look like an actual filing cabinet, drawer, and folder." Although most FileVision prospects relate to the graphical interface, the true benefits lie in the fact that users can find any document, any time using FileVision's powerful search and retrieval capabilities.

### Real Estate Development Group Solution

The CHA Real Estate Development Group exists to develop and acquire

quality, affordable housing to promote economic growth. The department focuses on mixed income communities that include public housing units. They are also charged with expanding the pool of developers and funding sources available to CHA for future projects.

Before FileVision, the Real Estate Group's grant applications and approvals, agreements, contracts, and any and all documentation was an entirely manual process. The department was running out of file storage and needed a more efficient way to manage housing development.

FileVision is currently helping the Real Estate Development Group to electronically manage grant applications and approvals, signed agreements, contracts, HUD approvals and correspondence.

According to Deborah Williams, Administrative Assistant, CHA Real Estate Development Group, "Before FileVision, my job was really hectic because we were running out of room and space for paper filing. FileVision has changed things for the better. We very easily set up the system to work the way we were already accustomed to. We didn't have to change what was working for us. We've simply improved it."

In addition to the room full of filing cabinets, Real Estate Development was keeping large binders for closing documents and finance evidentiary proposals. They have now scanned those files and eliminated the binders as well. With those documents and files stored in FileVision, it's much easier for the staff to locate files from their desktops.

Other departments within CHA need access to documents developed and managed by the Real Estate Group and now they can pull those documents up electronically from their desktops as well. Note that FileVision security rights and privileges can be easily administered from the department level all the way down to the document and annotation layer. Anyone who has a need to know can be given access and those who do not can be locked out.

Once a property has been completed, the rental process is ready to begin and the hand-off to the Operations department takes place. Before FileVision, the hand-off to Operations was a completely manual process starting with a face-to-face meeting to discuss the projects followed by the physical transfer of the folders, files and documents to Operations. Hand-off meetings still take place, but the folders and files are now

available to Operations electronically via FileVision. This has saved Real Estate Development and Operations a great deal of time. No more cumbersome file folders and binders or the possibility of lost or misplaced files. Having the files in an electronic format has made it easier for Operations to have access to exactly what they need when they need it.

Because Williams has fewer interruptions in her day, this has freed her up to work on the back file conversion (scanning in the pre-existing files). This will help Real Estate Development get rid of more filing cabinets and clear up space for other more productive use.

## Section 8 Housing Department Solution

The Section 8 housing program is sponsored by the federal government for assisting low-income families, the elderly, and the disabled to afford decent, safe and sanitary housing. Section 8 assistance is provided for both tenant based and project based housing.

CHA Housing Specialists in the Section 8 Housing Department use FileVision to handle the screening and approval of Section 8 applicants. Documents include proof of identification such as driver's licenses and social security cards, interview notes, along with applications, landlord approvals and HUD documents to name a few. CHA's Section 8 department was suffering from the same malady as Real Estate. They were running out of room to file. In addition, process management and file retrieval were cumbersome and time-consuming. Again, FileVision security rights and privileges can be easily administered from the department level all the way down to the document and annotation layer. Anyone who has a need to know can be given access and those who do not can be locked out.

HUD (The U.S. Department for Housing and Urban Development) plays a key role and in fact has oversight to all Housing Authorities. They conduct onsite visits to the Section 8 Housing department to view documents and insure accountability of the program. Again, these reviews were previously conducted manually.

CHA's Section 8 department spent the time to prove they could reliably provide electronic copies on the spot to HUD inspectors. As a result, HUD gave CHA's Section 8 department approval to use the new CHA/FileVision electronic filing and retrieval system to facilitate HUD's onsite visits and inspections. This has opened the door for other agencies to automate their paper processes. Vestuti stated, "When other Housing Authorities call us to discuss going paperless, we recommend FileVision. It works beautifully and it has already been blessed by HUD."

Using FileVision, Section 8 chose a "from this point forward" strategy rather than a back file conversion. They are currently only scanning new applications and related files. The Section 8 Clerks are shredding paper files (again, approved by HUD) after they are scanned which has put a stop to the need for additional file cabinets and space. Once the files are scanned, Section 8 Housing Specialists access and print the files they need with a few clicks of the mouse. In addition, the ability to email contracts to landlords or in fact, any document to anyone greatly enhances productivity.

## Section 8 Housing Department Benefits

"I like FileVision because it has made me more productive. If I or one of the Housing Specialists need to retrieve a file, we simply type in the applicant name and boom! All the documents and information are right there on our computer screens. No more trips back and forth to the filing

cabinets", stated Jamila Davis, Section 8 Clerk.

Overall benefits realized by Section 8 Housing are:

- Improve productivity
- Easier and faster access to files
- Streamlined processes and increased efficiency
- Faster turn around times
- Reduced overhead costs through elimination of physical storage space and expensive filing materials
- Improved communication and information sharing between departments

## Implementation

Implementation and training was handled by BMI. They taught CHA's FileVision users on-site with the hands-on method which focuses on process and functionality relevant to each user's job responsibilities.

## Future Plans

Future plans include rolling out FileVision information relationship management in Modernization, Accounting, Procurement, and Executive departments to name a few.

## About BMI

BMI, headquartered in Duluth, Georgia is the one-source technology partner for banks, financial institutions and local governments. With more than fifteen years of experience, BMI provides banks and local government entities with software and service from design and installation to support and monitoring. BMI is an Authorized Reseller of FileVision Information Relationship Management software. For more information about BMI, phone 1-888-264-7974 or email [info@banksys.net](mailto:info@banksys.net).

## 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).



Corporate Office  
1200 Ashwood Parkway  
Suite 400  
Atlanta, GA 30338 USA

T: 770-551-1400  
F: 770-551-1414  
Email: [info@filevision.net](mailto:info@filevision.net)  
[www.filevision.com](http://www.filevision.com)