

# Human Resources Case Study:

## National Heritage Academies

“OnBase and ImageSoft have allowed us to streamline our processes and create capacity for our team as we work to focus on our mission to “challenge each child to achieve...”

— **Jasmine DeRosia**  
 People Services Technology  
 Manager, National Heritage  
 Academy

### The Customer

National Heritage Academies (NHA) is one of the fastest growing public charter school management companies in the United States. Founded in 1995 in Grand Rapids, Mich., NHA partners with local school boards nationally to build and manage no-cost public charter schools. NHA operates 74 schools in nine states and provides education to nearly 48,000 students in grades K through eight.

### The Challenge

NHA's Human Resource department, known as “People Services”, was inundated with content pertaining to employees, job applicants, and HR policies and procedures, but lacked a central location for managing this information. Instead, information was saved in a variety of formats and in several places – in files of individual employees, on hard drives at multiple workstations, file shares on servers, and in paper format from legacy HR files. That made finding a document no easy task and presented a problem when preparing for compliance audits.

Like other organizations that rely on state funding, NHA is subject to periodic audits by multiple agencies. Pulling together the information required for even a single audit required extensive time and labor. Multiply that by 74 schools coupled with multiple audits per school per year, and – well, NHA had a troublesome issue.

To prepare for audits, NHA staff had to try to anticipate which files and documents might be needed then spend untold days and man-hours attempting to locate the needed information to take to the audit site. Then, if during the audit, the auditor required an unanticipated file or document, it could take several days to respond with the needed material.

Document security was another issue. With no single repository for information, there was no way to manage or track which personnel records could be accessed by whom, and managing personnel records centrally was a key imperative. NHA sought a way to digitally consolidate personnel records into one central location where they could be easily organized, located and securely accessed only by those with permission to do so.

### The Process

As an existing ImageSoft customer, NHA had already experienced first-hand the impact and the value of document management and workflow technology in other departments. Leveraging their technology investment by extending their ImageSoft-provided OnBase solution into People Services made good sense – practically and fiscally. So in 2010, ImageSoft began working with NHA to implement OnBase incrementally throughout the department, starting first in Compliance, then Rewards and Recognition, and later to Employee Relations, Employee Engagement, and Payroll and Severance Processing with the goal of creating an automated, paperless HR environment fully integrated with Lawson, its existing Enterprise Resource Planning (ERP) application.

## Their Success

With its ImageSoft OnBase solution now in use throughout People Services, NHA has benefitted widely from the resulting process improvements and efficiencies. All content pertinent to HR is now stored in a central, server-based system with secure access for People Services department representatives and individual access to select employees in a network environment. Content is protected against disaster and is organized and searchable for fast, easy access.

The dynamic electronic folder structure implemented by ImageSoft has made NHA's People Services staff much better organized and more efficient in the way they work with their records. Responding to a file request used to take up to half a day just to locate the file. Now, People Services staff have immediate and consistent access to every employee file in seconds and are assured that the document they are viewing is the most current version.

As a result, audit readiness has been vastly simplified. For example, the effort required for auditors to review all 30 schools has been reduced by 54 percent. Staff no longer have to try to predict which documents might be needed for an audit or search for missing files to assemble the necessary documents. Instead, information pertinent to a school or employee is instantly available with only a few keystrokes – even from remote locations – for inspection by the auditor.

In addition to reducing the time and expense involved in the audit process, the ImageSoft solution has also improved audit accuracy resulting in reduced findings against NHA. Even in a market where scrutiny has increased, NHA has achieved improved compliance ratings.

Labor savings is another added benefit. Despite having added eight new schools, staffing on the compliance team has held firm at six members, and NHA expects it to continue to do so, even with plans for further growth.

People Services staff have also benefited from automating a number of manual processes, further reducing labor costs and errors. The leave of absence process is one example. Applying for a leave requires employees to fill out multiple forms. Keeping track of those documents and due dates manually was a time-consuming chore. Now the process is automated. OnBase tracks which forms are due to be filled out when and by whom and automatically sends an email reminder to prompt the employee to submit them.

Document security has also been enhanced. With electronic documents and security features inherent to OnBase, NHA has greatly reduced the risk of unauthorized access to confidential employee files. NHA is now able to set security controls and can manage and track who is able to view or access documents.

Today, thanks to its new ImageSoft solution, the People Services department at NHA is able to provide services to its people more expediently, efficiently and cost effectively than ever before.

# National Heritage Academies

## The Challenges

- HR content was saved in a variety of formats and in a number of locations making it difficult to find information when needed
- Annual compliance audits were time-consuming and labor-intensive processes
- No way to track or manage who could access confidential HR records

## The Results

- HR records are digitally consolidated into one central repository for quick and easy access, even from remote locations
- Reduced audit time by 54 percent
- Substantially reduced time and labor required to prepare for compliance audits
- Realized labor savings by not having to hire additional staff despite major expansion
- Able to safeguard document security so that only those with permission may view confidential HR records
- Files, which once took hours to locate, are now instantly accessible