



For People For Change

FAMILY SERVICE TORONTO

Streamlining Direct Funding through Technology

Presented by: Vani Visva and Maran Ravindran

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Presentation Overview

- ▶ Introduction to FST and Passport Program
- ▶ Paper and Process problem
- ▶ Technology Solutions
- ▶ Key Success Factors
- ▶ Lessons Learned
- ▶ Future

Who are we?

Family Service Toronto is a 100-year-old city-wide social service agency

Province-wide program funded by Ontario Ministry of Community and Social Services

- FST is lead agency for Passport program in Toronto
- Helps adults with a developmental disability to participate in their communities
- Also helps caregivers take a break from their caregiving responsibilities
- 3,600 families and \$35M in funding and growing (about 20% of the province)

Purchase of Services (POS)

- Passport provides funding for client purchase of services
- Each family has its own approved budget
- Clients submit their POS invoices with backups to FST for reimbursement
- FST ensures the money is spent appropriately



Passport POS *Paper* Process

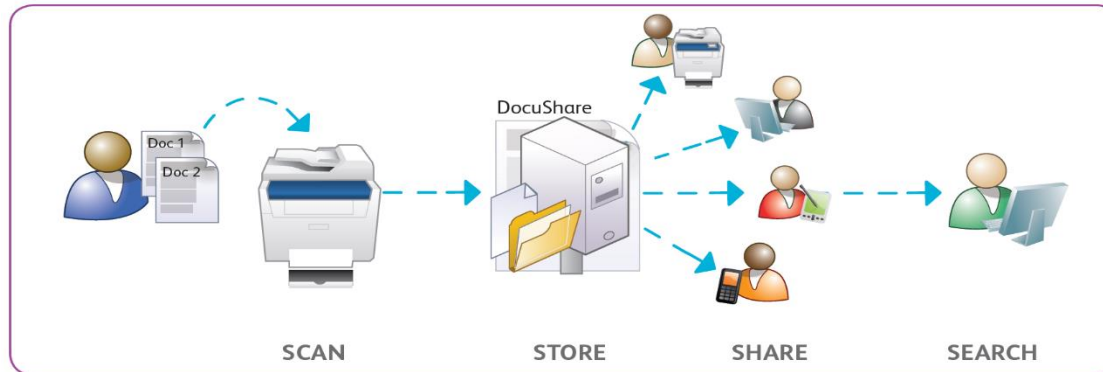
- Thousands of POS invoices and receipts for processing in a month
- Paper and electronic - mail, in person, email and fax
- Everything is printed and checked
- Distribution for approvals and follow-up
- Eligible POS forms keyed into our CRM
- 20% of forms have errors and questions
- 10% require manager's approval
- Eligible POS paid via EFT or cheque
- POS forms and backs ups are filed in paper

Why e-document management?



Phase 1

- ▶ Desktop scanners for receptionists with auto store and indexing and integrated with Content Management System



- ▶ Staff use multi-function printers to scan
 - ▶ Multifunction Printers with integrated Content Management System
 - ▶ One touch authentication
- ▶ Client databases link to Content Management System - one point access

Benefits

- ▶ No more filing cabinet and boxes
- ▶ Instant access to key documents
- ▶ Efficient access and retrieval -search features
- ▶ Different ways to file and store documents
- ▶ Cost savings -space, courier, shredding and time
- ▶ Added security and control
- ▶ Easy to purge -life cycle management
- ▶ Efficient electronic indexing
- ▶ Consistent file naming conventions
 - ▶ Reduced audit times and improved compliance

Phase 2

- ▶ FST barcoded POS forms
- ▶ Input from emails, faxes, hardcopies
- ▶ Converted into text searchable PDF
- ▶ Integrated with Electronic form Module
- ▶ Paperless solution
- ▶ Centralized queue system

Eform Module

- ▶ Creates unique ePOS form
- ▶ Integrated with CRM
- ▶ Auto/manual routing - approvals/rejection etc.
- ▶ Provides signature/date stamp, audit trails
- ▶ Improves security and form integrity
- ▶ Auto routed to Document Management System for filing + attachments

Phase 3

- ▶ Modified ePOS form provides online client access
- ▶ Benefits
 - ▶ Secure access for clients
 - ▶ Online claims for reimbursement
 - ▶ Validation at entry point
 - ▶ Business process redesign and efficiencies
 - ▶ Increased client capacity



[Instructions](#) [ER](#)

Client Login: Please call or email your coordinator if you haven't signed up yet. Submit the form once completely filled in.

Enter registered email ID:
 Enter your PIN #:

Login

Double click the "Login" button and then hit "Tab" button twice to bring up the funding information

Client Information:

Family Code	5547 <input type="button" value="Lookup"/>	Date Submitted	10/7/2016	Approved Amount:	13,305.00
Client Name	Bob McMillan	Coordinator	Venetta Tavernese (Ext. 289)	Spent Amount:	0.00
Division	PAS	Coordinator Email:	venettata@familyservicetoronto.org	Remaining Amount:	13,305.00

Payee Information: Please call or email your coordinator if you want to add/remove a payee from your list or update a payee's information

Payee: Address: 1000 Dale St. Toronto, M6M 3X4 Phone: 716-554-1589

Electronic Fund Transfer (EFT) Enabled: For fast payment, please register for EFT
 Paperless Payment Stub Setup: amarantang@familyservicetoronto.org

Notes (optional):

Reminders:

- Only one Purchase of Service (POS) form may be submitted each month
- Attach official receipts/invoices for proof of payment
- Submit one ePOS for one payee
- Incomplete POS forms cannot be processed and will delay payment
- Allow 30 business days for payment from date received in our office
- Please upload only image files(jpg, png, etc), pdf, or doc(x)

Upload Attachments: Please attach all the documents below

(Please limit to 15 attachments)

	#	Expense Description	Amount
<input type="button" value="Attach Receipts"/> 2 files attached	<input type="button" value="-"/> <input type="text" value="1"/> <input type="button" value="+"/>	Invoice 1 description	34.50
Total			\$0.00

Confirmation

By checking here and submitting this form, I, John McMillan acknowledge I have not previously submitted the attached expenses. (If you are not John McMillan, please do not proceed and call your coordinator.)

Submit

Go

Benefits

- ▶ Improved business processes
- ▶ Faster processing - same day processing
- ▶ Improved accuracy
- ▶ Improved search functions
- ▶ Key Performance Indicators
- ▶ Better client experience

Key Success Factors

- ▶ Senior management commitment
- ▶ Cost -benefit analysis
- ▶ Phased approach
- ▶ Trusted business partner
- ▶ Commercially proven technology
- ▶ File architecture mapped against business requirements
- ▶ A spark for process improvement!



Lessons learned

- ▶ Project must be lead by IT -business technology solutions
- ▶ Accuracy of scanning depends on business requirements
- ▶ Well thought out digital content management strategy

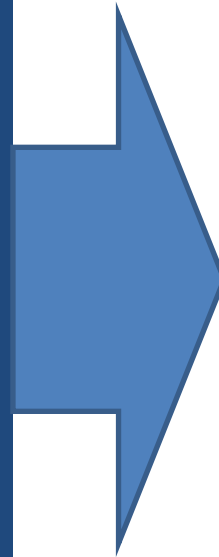


Future

- ▶ FST leading the way to greater digital capacity in Developmental Services sector
- ▶ Became the consolidated back-office payment processing entity for the province wide Passport program starting in 2018
- ▶
- ▶ FST will administer all financial transactions worth \$250 million for about 25,000 clients centrally going forward!!

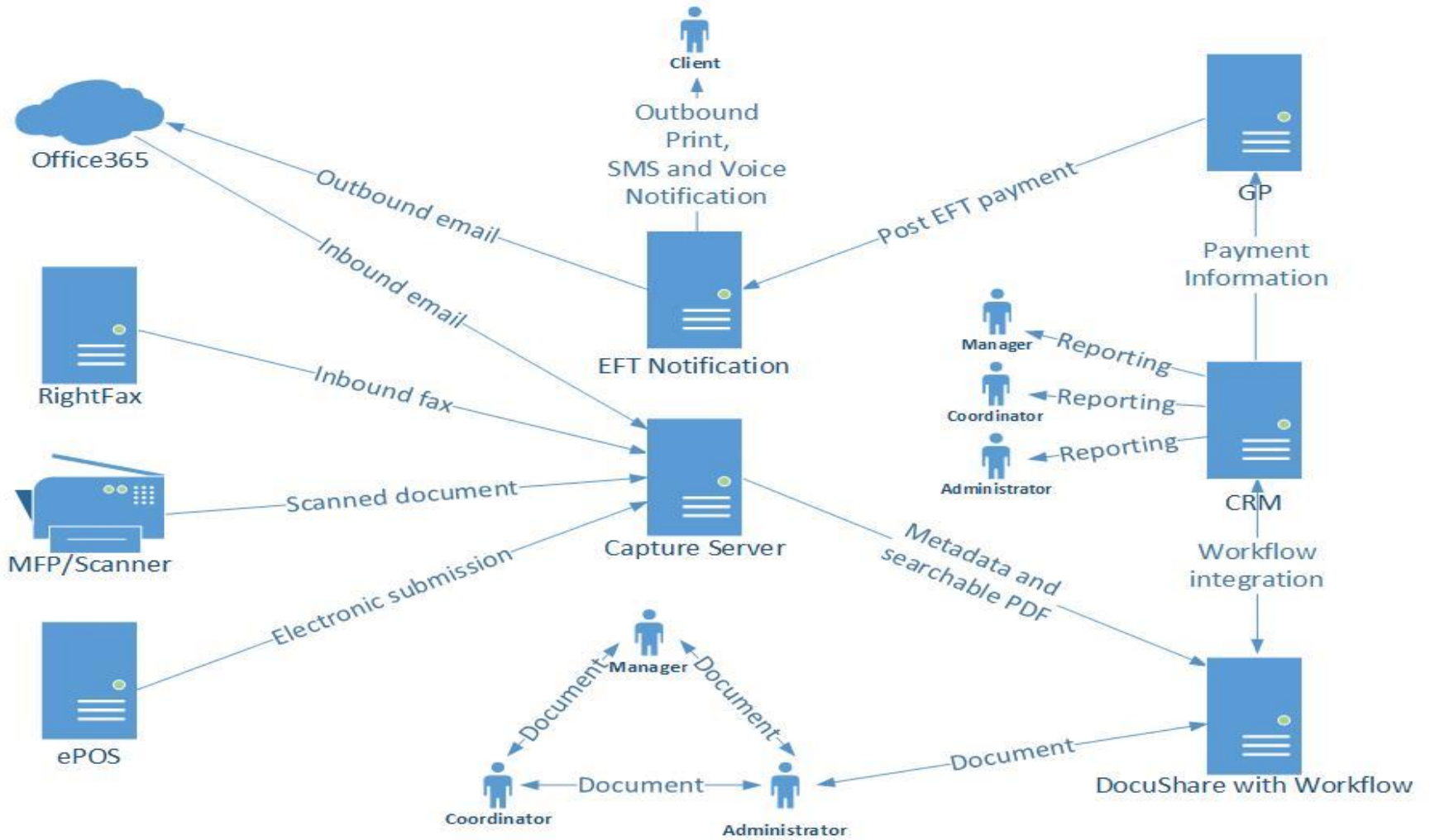
Passport Agencies across Ontario

- York Support Services Network
- Catulpa Community Support Services
- Tri-County Community Support Services
- Central West Specialized Developmental Services
- March of Dimes Canada
- Family Service Toronto
- Contact Hamilton
- HANDS The Family Help Network
- Lutheran Community Care Centre
- Extend –A-Family
- Community Services Coordination Network

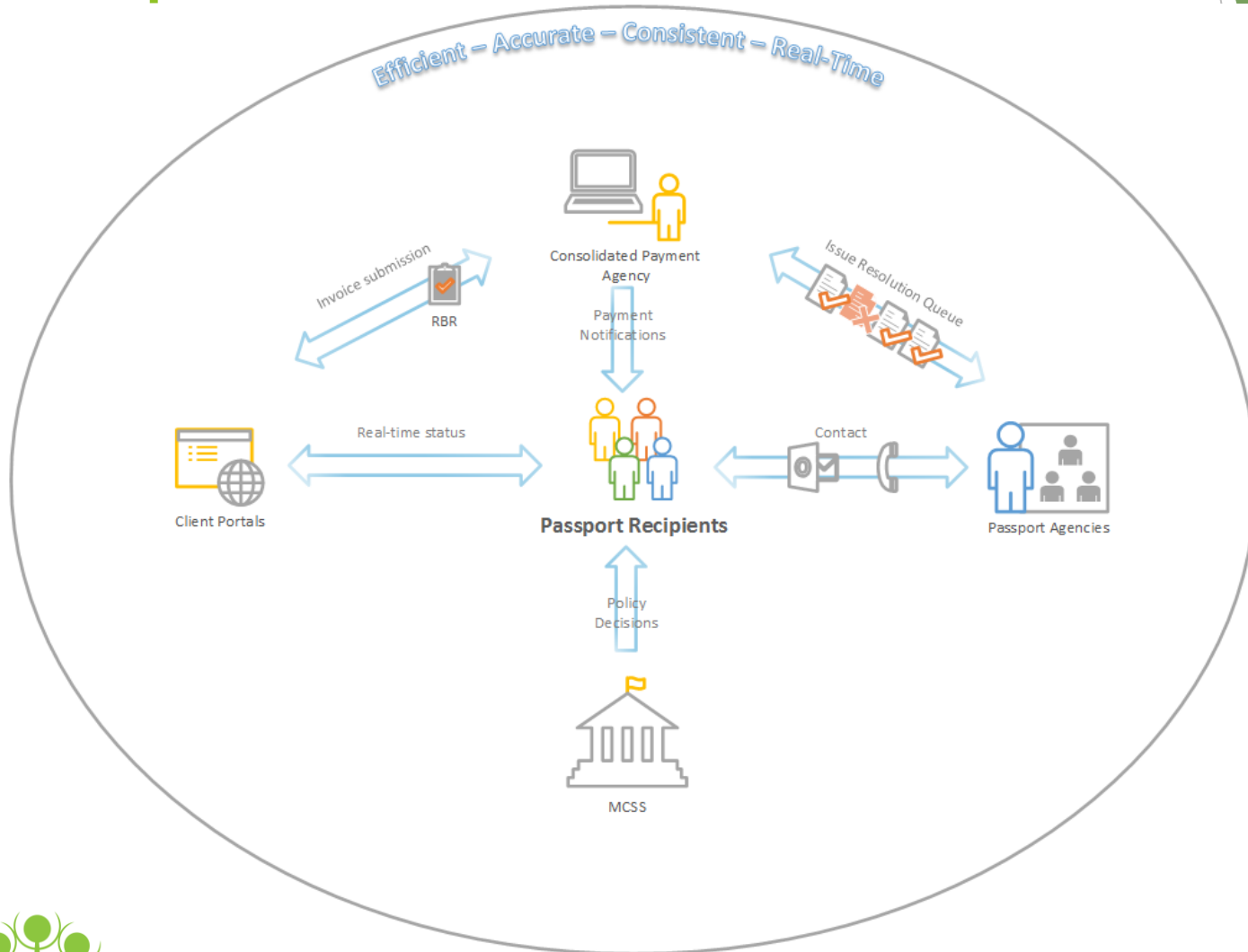


PassportONE

Current Passport Process at Family Service Toronto



PassportONE





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