The Cure for Filing Inconsistencies

If a clerical employee performs the bulk of your firm's scanning and filing and isn't intimately involved in the day-to-day servicing of clients, then you may experience one or more of the following:

(1) Employees don't always file documents the same way, leading to finding frustration.
(2) Significant training is required to explain what certain types of documents are along with the filing protocol for each document type to be filed correctly.
(3) Clerical employees tend to have higher turnover than professional staff, requiring constant retraining and leading to filing errors.

In the past, one solution to addressing filing consistency was to allocate scanning and filing responsibility to the firm's knowledge workers. Other firms opted to use a "filing request" cover sheet to accompany each document to be filed. This cover sheet is often filled in by hand for clerical staff to interpret sometimes illegible instructions.

While these options have merits, they also have inherent flaws.

Today, with Express Profile your filing process will be easy and efficient. No longer will you have difficulty finding archived documents. Every piece of content will be at your fingertips quickly & efficiently!

Here's how it works….

Express Profile for Worldox® enables a knowledge worker to make **electronic** filing "reservations" then hand off the scanning to literally anyone who can press the "scan" button on the scanner.

Let's say a new client gives you 30 documents. A knowledge worker can create thirty electronic file reservations in five minutes, placing a bar-coded cover page on each document.

Next, the pass…

A scanning clerk, who requires no knowledge of your filing structure nor any knowledge of Worldox, loads the entire stack of documents into the scanner's feeder tray and presses the "Express Profile" button.

Express Profile monitors the "scans input" folder, automatically filing documents to Worldox based on information associated with the reservation IDs.

Benefits?

The knowledge worker captures the filing instruction of the paper documents in a matter of seconds.

From that moment forward, this valuable information is memorialized and associated with the correct, individual document once the documents are scanned.

Salaried staff no longer waste time at the scanner and filing errors are almost eliminated.

What improved?

- Now documents are filed according to how the "users of the information" use the files.
- No illegible filing instructions; filing errors are almost eliminated.

Filing instructions are created quickly and electronically.

Contact Us Today to Learn More!

More importantly, scanning can be performed by hourly workers who routinely rotate in this role without the overhead of constant retraining, yet maintain reliability and filing accuracy. The scanning clerk only needs to know how to operate a scanner, and for many scanners, Express Profile further reduces that operation to a "push one button" operation.