

## PerfectForms Success Story: Ogden Clinic

### EXECUTIVE SUMMARY

#### CUSTOMER NAME

- Ogden Clinic

#### INDUSTRY

- Healthcare Services

#### BUSINESS CHALLENGE

- Create new workflows to generate time and cost savings
- Eliminate paper-based processes

#### PERFECTFORMS SOLUTION

- Digitized more than 30 paper-based process with PerfectForms
- Integrated PerfectForms with Active Directory, SQL Server database, and Web Services connections

#### BUSINESS CHALLENGE

[The Ogden Clinic](#), a healthcare services provider with seven locations in Utah, implemented a comprehensive project to move its internal business processes into an electronic format. Central to this effort was the elimination of paper forms, moving to a digital format to streamline the company's workflows.

The Ogden Clinic had for years relied on paper-based processes to accomplish every-day business tasks. This was especially true in the Human Resources department, where multiple paper forms were used for a variety of processes. The forms were representative of broader workflow challenges the Clinic faced. Ogden needed to find a solution that streamlined these workflows, while also providing a clear audit trail of each process. In addition to compliance with industry regulations, the audit trails were required in case any of the forms were needed for legal proceedings.

In late 2010, The Ogden Clinic evaluated several solutions to solve their workflow challenges from several different vendors. After an exhaustive review, they found many solutions proved too complicated to implement and would exacerbate, rather than solve, their workflow challenges. The challenges they faced required a technology that provided deep functionality with an intuitive and easy to use interface.

**"PerfectForms does more than digitize paper forms; it helps transform our workflow processes. The visual and easy to use interface has been a great addition."**

- Jim Richins, Senior Software Developer, Ogden Clinic

#### FORM AND WORKFLOW SOLUTION

The Clinic selected PerfectForms because of the product's extensive functionality, affordability and ease of use. Using PerfectForms, they have been able to digitize more than 30 forms and processes, including effectively all of those in the Human Resources department.

"We did a pilot project with PerfectForms, automating the paid time-off reporting processes. Many departments were accustomed to having paper forms, and were a bit skeptical at first," said Gordon Bradberry, Director of Information Technology. "The pilot was a huge success. Once everyone saw the benefits of automating these tasks, people embraced PerfectForms and now love it unconditionally."

After the successful pilot, the Clinic continued developing new workflow solutions with PerfectForms, including digitizing the company's annual review process. Traditionally, each employee had to fill out multiple forms, which were then managed by the Human Resources department. Digitizing this process eliminated the time wasted processing the forms and provided clear audit trails.

Several other project were also selected for development, including quality assurance tests for clinical and laboratory staff. To ensure that the clinicians are up to date on legal and internal standards, the clinic requires them to submit written tests on relevant subject matter. Using PerfectForms, Clinic developers streamlined this Point of Care Testing process by creating a self-grading electronic form. If a clinician were to fail the test, a copy would be sent to their manager and the employee would automatically be prompted to re-take the test. This significantly reduced the amount of time spent managing these tests.

Additionally, The Ogden Clinic leverages Perfect Forms ability to create connections to outside systems, particularly active directory connections. Using this database connection on virtually every form, the IT department is able to conclusively identify and authenticate a Perfect Forms user, and ensure that only authorized personnel are allowed to submit, approve, or deny a form during its workflow lifecycle.

### **BUSINESS RESULTS**

Since standardizing on PerfectForms, Ogden has realized some tremendous benefits, including:

- Digitizing paper forms of more than 30 business processes has helped Ogden eliminate the weeks wasted on processing paper forms;
- Integration with web services, databases and Active Directory helps eliminate redundant data entry processes;
- Easy form creation proved to be a significant time saver, ensuring the IT department was able to offer other department managers solutions to their business processes that they otherwise might not have been able to envision;
- Significantly reduced the complexity of processes associated with routine requests, including mileage reimbursement, employee reviews, and requests for changes to employment status or IT services, and more.