



DocuClass™

Housing Authority Success Story



The HACP is a municipal corporation, formed under the U.S. Housing Act of 1937, charged with providing “affordable decent, safe and sanitary housing for low-income persons.”

The HACP has approximately 350 employees and services over 18,000 family member residents. The Authority itself maintains approximately 2,992 low-income public housing rental units; and, through its Section 8 program, funds the rental of more than 5,452 occupied Section 8 households that are privately owned.

In 2012, as part of an overall initiative to streamline internal operations, HACP decided to invest in an enterprise content management solution (ECM) in order to achieve the following goals:

- Improve the effectiveness and efficiency of operations
- Improve the control and security of public records
- Image enable core administrative applications
- Reduce the cost and space required to maintain HACP records
- Assure and document compliance with records retentions regulation
- Streamline auditing procedures
- Eliminate redundancies and duplication of efforts

After a careful evaluation process, HACP chose the DocuClass ECM system for its reliability, flexibility and ability to grow as the needs of HACP grew.

“From the time of our first meeting the staff working on our conversion have proven to be nothing but professional. We chose to start our conversion with the Accounts Payable process and the response with regards to set up, design and training has exceeded our expectations. Cima personnel have displayed a quick grasp of our processes, have been proactive with respect to design, and as the “tweaking” continues, have been immediately responsive.”
~Alethea Cassidy, Finance Project Manager, Housing Authority of the City of Pittsburgh.



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Solution

The project started in the Finance, Accounts Payable and Procurement departments, where DocuClass is used to streamline the processing and approval all incoming invoices and related documents. All packing slips and invoices are scanned and indexed re-using data from the Emphasys Elite financial system in order to minimize unnecessary data entry. Once Invoices and packing slips are matched, documents are sent to the Finance department and an automatic notification is sent to the corresponding department manager for payment approval request.



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Once the approval request is received, all documents are then moved to the payment processing section of the DocuClass Workflow where DocuClass is updated from Emphasys with the corresponding check number and paid date. When the check is printed, it is also captured and matched with the other documents in DocuClass for permanent record storage.

After the Finance, Accounts Payable and Procurement system was successfully completed, DocuClass has been gradually implemented in many other departments such as Occupancy, Community Affairs, Low Income Public Housing, Resident Services, Operations and Information Systems.

Impact on Auditing

The old audit procedure was slow, expensive and the auditors had to wait for paper files to show up. As a result of DocuClass, the new audit process is very fast, inexpensive and results are provided immediately to the auditors.

"DocuClass enabled us to review invoice and reconciliation documentation as needed, without making requests of the client - taking up less of their time and our time. The information was already organized and available in DocuClass to review on demand."

~Brian McCall, Principal, Independent Auditing Firm.

