

RSL **LifeCare**

4 million documents digitised, secure, and searchable through customised SharePoint solution.

Residential Aged Care

THEIR STORY

RSL Lifecare provides retirement living and residential aged care services for veterans throughout NSW and the ACT. They also provide care and support for younger veterans in need of accommodation. The charitable organisation supports and cares for over 7500 residents across its 27 retirement villages and 29 aged care homes.

THE CHALLENGES

RSL Lifecare was moving its headquarters from Narrabeen, NSW, to St Leonards, near the heart of Sydney, and realised they had four million paper records that would need to be shifted or shared constantly between the two locations. The paper records were comprised of employee files, residential aged care files, and the retirement living files.

Due to the vast collection of paper records, RSL Lifecare was experiencing the following challenges:

- Inefficiencies and time wastage due to the amount of time it took to locate the right files.
- Inaccuracies across client information, e.g. a client's contact details had changed, and the paperwork was not updated.
- Determining how to transition client files when clients moved locations from a best-practice, record-management perspective.
- Issues when trying to align the information in the paper records to their legacy IT systems.
- Client records with sensitive information held in low security repositories.
- High paper wastage — on average, one Retirement Living resident file would amount to 100 one-sided pieces of paper.



These issues caused delays when searching for client information, particularly when the records were out-of-date. Shifting the four million records, or sharing them between the two locations that were a 40-minute drive apart, would make processes much more difficult and delayed.

RSL Lifecare needed to store these records for compliance requirements, but the paper versions were unsustainable. They began to look at a documentation management system to archive their files, improve the ability to search their data, and control access to the documents.



THE SOLUTION

Huon IT has partnered with RSL Lifecare for over a decade as an IT project work and escalation team. RSL Lifecare approached Huon IT with the digitisation problem, and requested Huon IT provide a proposal to help them shift their paper records to SharePoint.

Huon IT agreed SharePoint was the right solution, and set about implementing the document management system into RSL's existing systems. This process included the following:

► **Huon IT set up SharePoint and integrated the solution to RSL Lifecare's legacy IT systems and scanning software.**

- They integrated the solution with RSL Lifecare's scanning software.
- SharePoint was modified to be the document repository and cater for the CRM structure of RSL Lifecare's Accounts and Contacts, so documents could be classified correctly.
- A customised search interface was created for easier document navigation.

► **RSL Lifecare's in-house team scanned and digitised over four million paper records between 2019 and 2022.**

► **Huon IT created a folder structure for the customised SharePoint solution.**

- Each document was marked with a certain metadata to assist in searching.
- Azure functions were added to assist in moving the documents to the correct locations.

► **Huon IT implemented access permissions to the documents, strengthening the overall security and ensuring sensitive information was only accessed by people who needed it.**

► **Huon trained RSL Lifecare's staff in using and navigating the solution, scanning documents, and uploading them to SharePoint.**

THE RESULTS

The customised SharePoint solution has increased the accessibility, reliability, and security of RSL Lifecare's documentation repository. This has allowed them to respond to their clients and update information much more quickly and easily, while maintaining compliance to industry standards.

Within a couple of months of starting to scan files, Sydney went into the first COVID-19 lockdown. RSL Lifecare's staff could not physically access the files, so it was fortunate the project had started, and some files could be accessed remotely.

Digitising the documents has also given RSL Lifecare assured business continuity; their record room was flooded in 2021, but due to online repository, no files or information was lost.

Huon IT's work has allowed RSL Lifecare to:

- Reduce paper usage and movement.
- Free up over 80m of shelving space.

- Improve availability and searchability of online data.
- Better control the data through secured access to the documents.
- Increase overall efficiency of the care to their clients.
- Increase staff morale by providing access to technology that supports their work.
- Increase productivity.
 - Allow upwards of 70 users — many based away from the head office — immediate access to documents.
 - Retirement Village managers and assistants can personally access EDMs, instead of contacting head office and waiting for the files to be emailed to them.
 - Multiple users can access the same file simultaneously instead of waiting for one person to be finished with it.
- Comply with industry regulation standards.



“Huon IT can take on additional requests and deliver. They will go above and beyond for their clients. They customised SharePoint for record management, which was kind of special. Most organisations would have used tried and tested record management systems such as TRIM, or similar. Because of the expertise from Huon IT, we were able to customise SharePoint and use the brains from Azure to make it work. There were loads of change requests, and Huon IT was able to manage all these requests.”

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