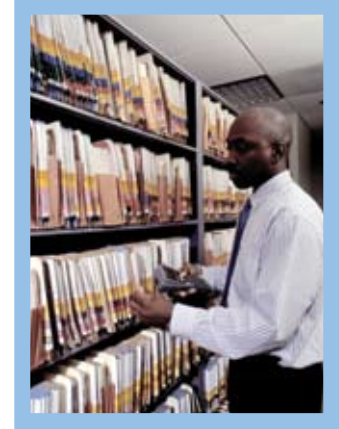




Benefits group utilizes Infolinx and Spacesaver systems to transform records management approach.



The United Mine Workers of America (UMWA) Health and Retirement Funds group, an independent non-profit pension and benefits company that supports UMWA union members, transformed its records management approach with the guidance of the local Spacesaver representative. The company utilized consulting and conversion services, new storage equipment and tracking software to solve its information management problems.

When the UMWA "Funds" group experienced a reduction in staff levels due to automation and operational streamlining, company administrators made the decision to move into a smaller, more convenient downtown D.C. location that is conducive to staff and material centralization.

The new space allotted to storage did not sufficiently accommodate all of the materials previously stored in more than 100 file cabinets, so a more efficient storage approach was considered. Additionally, the agency was in need of replacing its current file tracking technology with a system that was more configurable and allowed customization.

"I cannot put a dollar amount on the amount of liability of a lost file," said Linda Fritz, assistant director of eligibility processing and records management at the UMWA Health and Retirement Funds offices. "If there is a claim and we cannot reconstruct a case file, the ramifications can be severe."

Fritz affirmed that a space efficient, automated filing system that minimized square footage, decreased retrieval times, eliminated the possibility of lost or misplaced files and ensure accountability for every record was needed.

"Now, with all of our material consolidated, our organization is able to provide better service," Fritz said. "The Infolinx tracking system is more user-friendly and accurate than our old system. Our Spacesaver system is great and all of the conversions went well."

" There was no question that we needed a record tracking software system "
—Linda Fritz,
assistant director

Consulting Services

The Spacesaver representative worked with the staff to determine their needs, considering off-site and on-site records, paper-based records and microforms, and designed a storage and data management system that best met their requirements.



"They talked us through the workflow, considering all tasks associated with managing the records, then recommending the ultimate solution. If we would have purchased the elements from individual suppliers we would have been left with a lot to handle," said Fritz

Storage Equipment

A Spacesaver high-density mobile storage system with configurable 4-post shelving was selected for on-site storage to house all pension and Office of General Council records. It accommodates large boxes, side-tab shelf based records and 350,000 micro media records.

Conversion Services

The local Spacesaver representative managed a full conversion of records prior to the move. The top-tab records were transformed out of cabinets and converted to color-coded numeric, side-tab files for use on the self-based mobile storage filing system.

"They determined our file folder volume needs, provided all of the conversion supplies, generated the bar codes and color labels ahead of time and then brought in a conversion team to complete the transfer. The operation was clean and simple. We would never have been able to have completed it utilizing only our staff."

Record Tracking

The UMWA Funds group adopted the Infolinx file tracking system to maintain constant track of document location. With eight field offices accessing records, off-site storage and multiple record formats, continually accounting for records was a monumental task. Now, when a file is pulled out of storage for on-site or field office use or to be sent for microfilming, barcode technology instantly enters the new location data.

"There was no question that we needed a record tracking software system," said Fritz, "We had to be able to effectively track a variety of records including off-site boxed records, shelf-based files, and microfilm and microfiche documents. What attracted us to Infolinx was its versatility and ability to customize a database to meet our needs."



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