



## A FileHold Document Management Case Study

Milestone Retirement Communities [www.milestoneretirement.com](http://www.milestoneretirement.com) was founded in 2008, with the collective vision of creating an environment where residents, employees, and senior living investors feel valued and respected. Milestone has a culture of caring and of providing management services to seniors requiring independent living, assisted living, memory care, and specialty care.

Milestone manages and operates over 78 (and growing) retirement facilities located throughout the United States. Operations include the construction of new developments and acquisitions while managing relationships with their many employees, residents, vendors, and investors. Their mission statement is "To be open, honest and respectful to residents, families, employees and investors in working toward mutually shared goals."

An organization of this size generates millions of paper and electronic documents, many of which are contracts or agreements that must be preserved for a long time. Other documents reference employees or residents so they must be kept extremely secure. Milestone needed a way to centralize their document storage into a secure, version-controlled environment. There is often a requirement to roll back a document to a prior conversion. They also needed a way to allow each facility, in different states, to be able to add or check out documents from this central repository. Milestone wanted a system that would be easy to use and have the ability to set up workflows for document review and approval in a paperless environment. Since many of the documents are subject to compliance regulations, it was essential that there be a way to move them from the daily working document environment into a more "records" control function where they could be scheduled for eventual deletion.

Milestone was using courier services to transport paper documents, such as invoices, from the many regional facilities, in several states, to the head office in Vancouver, Washington. They were seeking a way to move these documents electronically and eliminate the very costly courier services. Having been in business since 2008, they had amassed a large library of paper documents so the chosen system needed a mechanism that supported document scanning so that much of this material could be converted into an electronic format.

To satisfy all of these needs they chose FileHold document and records management software [www.filehold.com](http://www.filehold.com). The FileHold software met all of their requirements plus it was seen as being easy to use (reduced training expenses), has a simplified interface (very familiar to Microsoft users), integrates with Active Directory (single sign on) and has 12 levels of [user permissions](#) to control the access users have to documents (very important for security).

Every installation of FileHold includes a document scanning product called [SmartSoft Capture](#) that has the ability to convert paper documents into searchable OCR'd electronic documents. It can also automate the capture of metadata both of which can be automatically added to FileHold.

Brandon Hudson, the Director of Information Technology at Milestone, said, "FileHold is our central and single file repository for document archive and storage. It is easy for our users to access the system and archive files. We now can version control our documents to ensure we are working with the most current version or we can roll back to a previous version when needed. Perhaps most importantly, because of the secure user roles, we make it impossible for users to delete files which is essential to remaining in compliance with various document retention regulations. Both the FileHold product and their support team have been excellent to work with."

Milestone purchased the Enterprise version of the FileHold software that can manage thousands of users and trillions of documents. Milestone is adding users on a regular bases as it rolls out to different facilities. Adding licenses to FileHold is a simple matter of making an email request. Milestone also purchased a "[FileCare](#)" agreement that gives them unlimited technical support and all future product upgrades in essence future proofing their installation.

Branden Hudson stated: "The installation was made painless by using the FileHold preinstall checker, a utility that monitors the server and reports if the server was correctly prepared and is ready for the final installation. In addition the FileHold Instrumentation Tool allowed us to easily backup all configuration files and restore from backups. We deployed the desktop clients via a script we created in our end point management solution (Kaseya). Training was done by our corporate trainer. The FileHold software is installed on premise using VMware ESXi 6.0, Window Server 2016, and SQL Server 2016."

To learn more about how FileHold software can help your organization "Go Green - Go paperless" contact [sales@filehold.com](mailto:sales@filehold.com) .