



SHAREBASE | CUSTOMER SUCCESS

# TEXAS ASSOCIATION OF SCHOOL BOARDS

## ShareBase enables seamless and secure document transfer for statewide organization

The Texas Association of School Boards (TASB) is a voluntary nonprofit association established in 1949 with a mission to advance public education in the state. Besides serving all school districts by providing information and training to help school board members serve their communities more effectively, the association also represents members' interests to decision makers to chart the best future for Texas public schools. TASB includes seven related entities such as the TASB Risk Management Fund, a risk-sharing pool that provides services for auto, liability, property, unemployment and workers' compensation.

### THE CHALLENGE

The association was already using the OnBase enterprise information platform, but needed a secure way to share documents with members and other TASB entities. Without direct integration, sharing documents using its previous solution Box was

a cumbersome, multiple-step process — users had to download documents onto their computer, re-upload the document to Box, then send a link and monitor it. Several cloud sharing hosts were used to share information with different users.

This was not only an inefficient way to transfer documents, it also posed a significant security risk. Multiple versions of the documents existed in different locations with no indication of which was the latest iteration. There was also no visibility into who had accessed the document and what changes they made to it.

The Risk Management team had to deal with another challenge. Processing claims involved sharing huge document packets with medical providers — some of which still rely on paper forms. After the document packets were generated in OnBase, they had to be saved, printed, then mailed or faxed to the providers, resulting in blind spots in the workflow and bottlenecks in the process.



#### INDUSTRY

Nonprofit

#### SIZE

1,025 members

#### LOCATION

Austin, Texas

#### ENTITIES USING SHAREBASE

Texas Association of School Boards

TASB Risk Management Fund

TASB Energy Cooperative

TASB Benefits Cooperative

First Public

Local Government

Purchasing Cooperative

“ In the Risk Management team, ShareBase has taken the multiple-step process of sharing documents down to zero clicks in some cases. It’s really helped us a lot in terms of saving costs, time and paper. [ShareBase] makes it easy to share things securely.”

**Brett Gordon**  
System Administrator

### THE SOLUTION

TASB needed a solution that would integrate with its existing information platform — not only for OnBase users, but also users of other cloud sharing hosts. Burdened with supporting various solutions, the Information Technology department wanted to maintain one product across the organization.

An initial trial with the Risk Management team proved the integration with OnBase was invaluable. ShareBase enables documents to be shared with medical providers directly from the OnBase workflow, drastically cutting the multiple-step process down to zero clicks in some cases.

“The OnBase and ShareBase connector is able to do — what used to take several clicks — in fewer steps. In some cases, no clicks at all. It just does it,” said TASB system administrator Brett Gordon.

“It’s really helped us a lot in terms of saving costs, time and paper. ShareBase makes it easy to share things securely.”

Document packets no longer had to be downloaded and re-uploaded, or manually sent to doctors’ offices. Instead, the adjustor just needs to provide the medical provider’s email address. After the document package is generated by a claims specialist, it gets uploaded and emailed to the provider at the end of the workflow.

After seeing how well ShareBase would work for both OnBase and general users, TASB decided to phase all Box users over to ShareBase and roll it out to other departments.

“Since adopting ShareBase, we have expanded it across the group and now there is a user in every entity. The feedback has been primarily positive and although there were some hiccups in the beginning, ShareBase responded promptly to resolve any concerns,” said IT project manager Kristi Palm.

Adoption of ShareBase continues to grow within TASB entities as needs for a cloud sharing service are identified.

### THE DIFFERENCE

#### Seamless sharing

ShareBase enables the seamless transfer of documents. Thanks to its intuitive integration with OnBase, documents don’t have to leave the workflow to be shared, even with non-OnBase users. Instead of having to download, re-upload, encrypt and even mailing or faxing documents, sending documents to reviewers outside of TASB is now a simple process that only requires an email address.

Non-OnBase users in the organization are also able to easily share documents with TASB members and the public who need access to them. For example, the TASB policy group uses ShareBase to hold and share over 3,000 documents with school districts, as well as to provide a boiler plate policy that school districts can access and customize.

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**Kristi Palm**  
IT Project Manager

### Increased efficiency

Besides cutting down the multiple-step process to share and transfer documents, ShareBase also eliminates inefficiencies when TASB receives documents from external parties. For example, when Risk Management receives an invoice from an auto body shop, it can't generate a payment without a W-9 form. Before adopting ShareBase, the adjustor would have to contact the body shop for them to submit the W-9 form, and the Risk Management team would have to import it onto OnBase. The team also had to manually index and verify the information.

With ShareBase, the adjustor can generate a link simply by entering a provider's email address. The provider can drag-and-drop their W-9 form into ShareBase, and then OnBase automatically indexes the information and notifies the adjustor to honor the payment.

### Greater security

TASB is able to grant and control access to documents directly on one platform, making it easier to authenticate the latest or correct version of a document. ShareBase also ensures greater compliance and data security as documents don't need to be downloaded onto users' computers or shared via other means.

“I use ShareBase to transfer documents to outside partners, particularly large files containing confidential information,” said Palm. “ShareBase enables us to share these documents easily. We can give (our partners) the link and set it to expire so they are able to get it downloaded securely.”

### Mobile integration

Some entities within TASB such as Facilities Services need to be able to access their files while in the field. With mobile integration, ShareBase enables members to access items they need while they are out of the office and working with school districts.

### Return on investment

TASB is able to realize increased efficiencies in accessing and sharing documents as well as reduced costs associated with time, resources and paper. With its OnBase integration, users are able to easily provide documents to TASB members and external parties; what used to take multiple steps is now a one-click option in the OnBase workflow.

Other cloud sharing hosts including TASB's previous solution Box sometimes require document recipients to have their own licenses as well, but ShareBase's ease of access enables TASB to realize a return on investment in a shorter time period of time.

Learn more at [ShareBase.com](https://www.sharebase.com)

