

Department of Child Services Automates Executive Document Tracking And Review

“Red Folder” Process Streamlined from Months to Days

Through the Golden State’s Health and Human Services (HHS) agency, California’s [Department of Child Support Services](#) (DCSS) works with parents and guardians to ensure that children and families receive the financial and medical support that they need. The operational and administrative management of the program involves an intricate network of government employees that need to work together, along with service providers, to facilitate the delivery of critical child support services.

CHALLENGE

Like many government agencies, DCSS had a long-standing manual executive document review (a.k.a. “red folder”) process for anything that required authorized and sequential approval signatures. The process often took 60 to 90 days to manually collect signatures, and it wasn’t uncommon for employees to obtain sign-offs from 17 different stakeholders for a single folder.

There was no tracking mechanism for these documents. No one person could have eyes on a folder through every step of the process physically, digitally, or otherwise. Red folders could go missing, or they were routed through the entire process only to be deemed “incomplete,” which created extra work and wasted more time. Furthermore, a lack of reporting made oversight difficult. In addition, government employees invariably lost the ability to collaborate in the review process.

SOLUTION

DCSS chose to transition to the no-code, cloud-based [SimpliGov](#) platform as the solution to replace its manual process. The platform met the department’s criteria:

- A solution provider that could meet the unique needs of government
- Required compliance and audit capabilities
- Integration of automation tools
- Budget friendliness

Rather than have the review process proceed in sequential order, SimpliGov allowed for simultaneous reviews and approvals. Approvers could connect key individuals at specific points in the process and see each reviewer’s notes at any time. The department can now view the status of any red folder—where it is in the process, who has it, and when it is projected to be completed—thereby improving accountability. SimpliGov’s intuitive features and functionality helped finish the project **three weeks ahead of schedule.**

“Having a digital tool like SimpliGov that offers ease of use and the transparency of being able to see where the folders are in the review process is extraordinary,” said Kimberly Peng, Chief of the Procurement and Contract Branch at the California Department of Child Support Services. **“Now we have eyes on every request, and the person responsible is able to follow up and track what each person did, while mirroring the existing process in the system.”**

RESULTS

SimpliGov helped DCSS far exceed its initial goal. The agency reduced the number of days to conduct the red folder process from start to finish to just 10—up to 88% faster—while maintaining the existing steps of the process itself, including the sometimes-numerous required signatures.

The shift to an [automated red folder process](#) with comprehensive tracking and reporting capabilities has created new levels of efficiency, logistical simplicity, and digital visibility.

Fortuitously, the automated process also came at a time when the COVID-19 pandemic began forcing shutdowns and stay-at-home orders in California and across the nation. The digitization of the red folder process meant that employees could continue to move deliverables through the system while working remotely.

“Our department’s partnership with SimpliGov has been great to get the automated red folder process up and running,” added Peng. “We’re looking forward to building additional workflows on the SimpliGov platform in the future.”

Kimberly Peng
Chief of the Procurement and Contract Branch, California Department of Child Support Services