

Sonoma County Automates Staff Development and Wellness Reimbursement Process

Workflow Automation Helps Speed Employee Reimbursement from Months to Days

Sonoma County's Staff Development and Wellness Program is popular with its approximately 3,300 employees. Ninety percent of its \$3.4 million program budget is utilized, which necessitates a heavy volume of administrative processing.

CHALLENGE

Employee reimbursement claims were being handled manually and were reliant on paper. The form being used was old and hard to find. After downloading and printing a PDF from the form, staff members had to complete a convoluted reimbursement request, copy accompanying receipts, and bundle everything into one paper packet.

Next, each packet was routed to a supervisor for review by hand or courier. After several pre-reviews, they were finally evaluated by HR, which would separate the claims into taxable and non-taxable reimbursement categories, and more copies were required for each stack if the submission fell into both categories. Sometimes multiple copies of forms were in circulation.

As a result, the manual reimbursement process could take **four months or longer**, which was unsustainable in terms of both operational efficiency and employee satisfaction.

"The form was very busy and overwhelming, as well as difficult to complete," said Deborah Lindley, Records and Information Manager, Sonoma County. **"Tracking the submission was challenging, and there were no notifications at all during the process. Many people felt put off."**

Furthermore, HR frequently received incomplete forms, poor copies of receipts, and even full duplicate submissions when employees were unsure if their claims went through. Due to the time involved, some employees would forego submissions altogether—sometimes leaving up to \$500 in entitlements. **"Some felt the process was so painful that it wasn't worth the effort,"** added Lindley.

SOLUTION

Sonoma County selected [SimpliGov's](#) no-code cloud platform over other complex, code-intensive solutions and "freemium" point products that lacked robust features, flexibility, and scalability. SimpliGov met a long requirement list and was by far the fastest solution to implement.

Using SimpliGov, employees can easily access the reimbursement form. The form pre-populates background information with a unique employee ID, saving employees time from repetitious, manual field entry (e.g., name, department, email, phone, manager, bargaining unit, and benefit eligibility).

"This shift to digital removed a lot of the guesswork involved in the initial manual completion of the form. It helps ensure that HR receives complete content," added Lindley.

SimpliGov's progressive field display only shows relevant questions based on the selected reimbursement category, built-in calculators, and portal for uploading of receipts.

Once a form is submitted, HR and the employee receive alerts that the form is awaiting review. Any questions and correspondence are done in SimpliGov and captured as part of the record. Upon approval, the employee receives a notification regarding when they will get reimbursed.

RESULTS

Sonoma County now takes only one to two weeks to go from filing to reimbursement. The efficiency of digital automation reduces processing time by months, representing **a time reduction of at least 87%**.

The county was able to realize value quickly, as SimpliGov's cloud architecture eliminated the need for the long and costly "rip-and-replace" of existing infrastructure. Other benefits include:

- Elimination of infrastructure support costs
- Minimization of manual work
- Elimination of massive supply costs (paper, ink, etc.)
- Quick status insights via dashboard and one-click record access for full visibility
- Reliable record keeping

"...We were able to free up resources, increase the amount of benefits utilized by employees, and receive more reliable information on a consistent basis. Thanks to the intuitive, easy-to-use form and quicker reimbursement time, employees now feel encouraged to file their submissions, and they absolutely love the new process."

Deborah Lindley
Records and Information Manager,
Sonoma County