

ORANGE COUNTY INDEXING AUTOMATION CASE STUDY

How Orange County reduced manual data entry, brought redaction in-house, and reduced the public access wait time for documents from 6 to 12 days, to only 48 hours.

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s **LAURA DOE** named as
executed by **MARTIN DOE**

RECORDING REQUESTED BY:
MARTIN DOE

RECORDED, MAIL ROOM

ANAHEIM, CA 92802

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THIS SPACE FOR RECORDERS USE ONLY

AFFIDAVIT DEATH OF A JOINT TENANT

MARTIN DOE, of legal age, being duly sworn, deposes and says that he is the duly qualified copy of the
copy of the original instrument recorded as instrument No. 2009002259C75 on 06/05/09, of Official Records of ORANGE County, California, covering the following
description: **852 AND 892 1/2 SOUTH CLAUDINA STREET, ANAHEIM, CA 92802**
HUSBAND AND WIFE AS JOINT TENANTS, recorded as instrument
No. 2009002259C75 on 06/05/09, of Official Records of ORANGE County, California, covering the following
description: **852 AND 892 1/2 SOUTH CLAUDINA STREET, ANAHEIM, CA 92802**
Commonly Known As: **852 AND 892 1/2 SOUTH CLAUDINA STREET, ANAHEIM, CA 92802**
DATED: March 15, 2016

A notary public officer or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is affixed, and not the truth or validity of the contents of the document.

COUNTY OF **ORANGE**

Subscribed and sworn to before me on this 15 day of April, 2016.

BY [Signature] Notary Public, California

WITNESS my hand and official seal

Signature [Signature]

(SEAL)

extract 

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ONE OF THE LARGEST COUNTIES IN THE UNITED STATES SAVES TIME AND MONEY BY USING EXTRACT SYSTEMS' SOFTWARE.



BACKGROUND:

Orange County is California's third largest county with a population of 3,194,830 and the sixth most populous county in the nation. Therefore, the county must process a considerable amount of records in order to make them available to the public in a timely manner.

Orange County's Clerk-Recorder Department was outsourcing redaction responsibilities and relying on very time consuming manual in-house indexing process. Consequently, these two processes delayed public availability of documents for several days. Orange County required a solution that not only integrated both processes, but also easily integrated with their current platform, SouthTech's LandDocs™. The solution needed to also handle the significant document workload of **800,000 documents per year** totaling **3.6 million pages annually**.

ORANGE COUNTY'S VISION:

Orange County wanted to provide public access to recorded documents within 48 hours after receiving them. To do this they needed to index the documents and comply with California AB 1168 which required California Clerk-Recorders to redact sensitive information from all public documents filed from 1980 to the present. What was needed, was a quick way to redact sensitive information while simultaneously indexing the record.

Challenges:

24-HOUR REDACTION DELAY AND ACCURACY:

Orange County was sending recorded documents to a redaction service to have SSN redacted, and there was a 24-hour turnaround time to get redacted versions of those documents back. This redaction process needed to be integrated with the indexing process and the turnaround time needed to be reduced, to meet their goal of making the information available to the public sooner.

COMPATIBLE INTEGRATION:

An intelligent redaction solution that was capable of integrating with their current land records system was needed. Orange County handles their indexing verification in one user interface, and it was important to the county not to introduce a second interface, or to veer away from the existing data entry platform.

STREAMLINE WORKFLOW/BRING EVERYTHING IN-HOUSE:

Under the weight of growing volumes, the county's workflow was failing to achieve important service standards for making the official record available online quickly. This was due to the fact that daily recordings had to first be sent to an outside vendor for redaction, then the documents were reviewed for quality control, then they were manually indexed. All of these steps delayed the turn-around time for the County to post recorded documents to the public index from six to ten days after recording. Consequently, the county sought an automated document handling solution that would combine all these processes and reduce the time to post recorded information to the public index to within 48 hours.

"AUTO-INDEXING & REDACTION WERE CRITICAL COMPONENTS TO MEETING THE ORANGE COUNTY CLERK-RECORDER, HUGH NGUYEN'S, GOAL OF MAKING RECORDED DOCUMENTS AVAILABLE TO THE PUBLIC WITHIN 48 HOURS"
-DANA OHANESIAN
DIRECTOR OF ADMINISTRATION

TREMENDOUS WORKLOAD:

Orange County's average daily recordings were **2,500 documents** which equates to almost **13,000 pages**. The county needed a proven solution that could handle these volumes, plus intermittent spikes exceeding **12,000 documents per day**, totaling as many as **40,000 pages**.

Extract Solution:

ACTION:

Orange County had initial concerns about a vendor being able to process their significant volume of documents. To ease their concerns, Extract was able to process an entire day's volume during their one-hour automated indexing and redaction software demonstration, while on-site.

Extract worked with Orange County for about three-months creating a proof of concept that could be integrated with their current indexing user interface, SouthTech's LandDocs™. It was imperative for Extract to integrate with the county's existing user interface, so the amount of change for the indexing staff would be minimal. Once Extract's automated indexing and redaction software was purchased in June 2016, it took only two short months for implementation.

RESULTS:

The county purchased the Extract Systems Platform (Both ID Shield™ and FLEX Index™) to automate the document indexing processes that was being performed in-house manually, as well as the redaction activities that were being outsourced. Extract's tightly integrated solution made the transition simple and effortless for the Orange County staff. They continued to use their current data entry screen, except now **75%-90%** of the data is automatically pre-populated with Extract automated indexing functionality. If indexing staff need to make changes, they can simply highlight (or rubber band) text instead of manually entering it.

Benefits:

Making documents available to the public within 48 hours of the day they are recorded. By automating the indexing process, Orange County was able to free up time for their existing indexing staff to bring redaction processing in-house. Reducing the 24-hour delay, was a critical objective, and it also allowed them to eliminate the need of an outside vendor for redaction activities. Immediately upon implementation of Extract, Orange County's redaction process was **cut from 24-hours to just under 12-hours**. By the **third month** of using Extract the processing time was reduced even more, taking only about **3-hours**.

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EXTRACT'S TEAM PROMISED AND DELIVERED A SMOOTH INTEGRATION OF THEIR AUTOMATED INDEXING AND REDACTION SOFTWARE WITHIN TWO MONTHS OF SIGNING OUR CONTRACT. WE ARE THRILLED WITH EXTRACT SYSTEMS™ AND THE PERFORMANCE OF THEIR TECHNOLOGY.

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-SUSIE SULLIVAN
MANAGER OF
INFORMATION
SYSTEMS

Software Detail:

EXTRACT REDACTION SOFTWARE (ID SHIELD):

OCR output is critical to any redaction process. The better the quality of the OCR output file, the greater the accuracy of the redaction. Extract Systems redaction software starts with the industry-leading OCR engine, deploys machine learning to classify documents, and layers additional recognition technology into the software to find data within complex unstructured documents.

Extract's state-of-the-art data detection rules find and redact all sensitive data types including: Social Security Numbers, dates of birth, credit card numbers, CVV codes, account numbers, check numbers, expiration dates, names, postal and email addresses, and virtually all types of personal information within structured and unstructured documents. This core competency is a proprietary formula that incorporates pattern recognition logic, phrase context proximity and keywords into the software based on the data that needs to be captured and secured. Redaction zones are burned in, making it impossible for identity thieves to retrieve private information. All hidden meta data associated with the original document is eliminated. Depending on customer requirements, the original document always remains unaltered, but the copy (or copies) of the original can be redacted and saved to a database, or can be indexed, then redacted. Redactions can be applied to the image, or the location of the sensitive information can be noted for redaction at a later time.

EXTRACT INDEXING SOFTWARE (FLEX INDEX):

Automated document indexing technology starts with the industry's most powerful character recognition engines for machine printed information. Next, rules-based detection logic is applied. Its proprietary rules formula uses keywords, phrases, contextual clues, pattern recognition and spatial location to find important data types. Extract's indexing functionality analyzes and classifies documents in the same way a human would: it scans the document with content and context-based logic to determine document type. User-defined data is captured based on document type and presented for validation. Extract's indexing functionality is flexibly designed to easily deliver captured fields to all record, case and document management systems. Equally adept at processing small or large volume projects, Extract scales and configures to fit all workflows.

THE EXTRACT SYSTEMS™ PLATFORM:

Extract is a leading provider of advanced data capture and redaction solutions that drive operational efficiency and secure private information for government, healthcare, and other commercial sectors. Extract's advanced redaction technology has processed more than 4-billion documents for over 400 customers without a single breach in data protection. Extract's data capture products automatically find and incorporate manual data entry fields into designated information systems as structured data. Automatic capture of information trapped in paper-reliant workflows reduces costs and optimizes the intelligent collection of data.

ORANGE
COUNTY IS

1 OF 22
CALIFORNIA
COUNTIES USING
EXTRACT FOR
REDACTION AND
1 OF 10
CALIFORNIA
COUNTIES USING
EXTRACT FOR
DOCUMENT
INDEXING.