

BCHD Document Management System Needs Assessment

I. Introduction and Background

In December 2012, the Baltimore City Health Department (BCHD) received funds to support activities that would prepare BCHD for national accreditation by the Public Health Accreditation Board (PHAB). One such activity is the selection and implementation of a software management system for the documentation required to prove compliance with PHAB's standards and measures. The purpose of this needs assessment is two-fold:

- a. Identify an optimal set of features needed for the document management system
- b. Identify a document management system that balances features and costs

II. Methods

We :

- a. researched document management systems currently in use by other local health departments
- b. researched features in these and other available document management systems
- c. compiled a list of features from these systems
- d. ranked the compiled list of features by suitability
- e. performed a weighted analysis on available systems, with cost, ease of implementation, and suitability of features as weighting factors.

III. Key Findings

While there are many document management systems available, the two most commonly used at local health departments are SharePoint and MindJet. SharePoint is used by a number of state health departments, and for a variety of purposes, while MindJet, though having additional project management features, is primarily used for document management.

Features and costs ranged greatly, with a direct relationship between range of features and costs. Free or minimal-cost solutions, such as DropBox and Google Drive, provide adequate document storage features, but do not provide the flexibility to edit and manage documents easily. Products such as SharePoint and MindJet offer far more robust

document management features, but are expensive to implement, and, in some cases, require dedicated technicians on staff.

IV. Recommendations

Based on the weighted analysis, Mindjet's Project Director offers the best balance of features and costs, with additional features that provide value beyond document management.

V. Appendices

- A. Document management systems used by local health departments
- B. Prioritized feature list of document management systems
- C. Weighted analysis