

# documotive



## The brief

When new legislation was introduced on 1 October 2008, requiring all homes to carry Energy Performance Certificates (EPCs), Helena Partnerships needed an efficient way for surveyors to carry out Energy Performance Surveys and generate the required EPCs

## The solution

The introduction of Documotive's Docuforms – a mobile system for handheld PDAs.

## Outcome

As a social landlord responsible for more than 13,000 homes in and around St Helens, Merseyside, Helena Partnerships is committed to ensuring that all of its properties meet current regulations and contribute, wherever possible, to making neighbourhoods cleaner and greener. As a forward-thinking, progressive organisation Helena Partnerships was keen to have software to enable regulatory compliance well ahead of the 1 October laws.

Helena Partnerships already enjoyed a productive working partnership with Documotive, using the Integrated Document Management for housing and tenancy files, plus Documotive's Business Process Management solutions. So when it was announced that the new EPC legislation was to be introduced, Helena turned immediately to Documotive for a cost-effective solution.

Documotive was able to offer Docuforms: a mobile system for handheld PDAs. Using Docuforms, a qualified surveyor can complete Energy Performance Surveys on site and then instantly transmit the data to a central server. The data is used to generate an EPC for a property, eradicating the need for paper forms and work by back-office administration staff.

Ian Robertson, IT Manager at Helena Partnerships, explained the thinking behind the solution. "Helena Partnerships was confident that the new EPC Surveys solution from Documotive would provide significant cost savings whilst reducing the amount of surveyors' time needed to complete the Energy Performance Survey," he said. "In addition data is transmitted in real time thus making the end-to-end process more efficient."

Helena Partnerships has found the Docuforms system so effective that the organisation is now offering a fully managed EPC Surveys solution to other social landlords who need to comply with the new legislation and would like to benefit from the reduced costs and time saved.