Digital Mailroom by CDM

The Mail Solution You've Been Waiting For

It's no secret that the traditional office mailroom has gone the way of the rotary phone – a relic of a simpler time, when sensitive documents were opened by hand and routed personally through the organization. Of course, business moves much faster today.

The volume of incoming mail via paper, email, email attachments and webforms make it nearly impossible to manage sensitive records and create sustainable workflows. The result is slow, error-prone and downright risky data management that adversely impacts business.

Enter Digital Mailroom by CDM: the high-quality, cost-effective mailroom solution that can transform your entire organization.

> "Digital Mailroom by CDM has given us the ability to not only serve our clients during these unprecedented times, but also to empower us to deliver our renowned services with unmatched speed, accuracy and security."
>
> - Gregory Lawler, CIO of GPM Life

Customized for the Way You Do Business

Digital Mailroom by CDM is customized to align with your existing business processes. As a leading provider of ECM and Workflow Automation Solutions, CASO Document Management (CDM) can streamline processes across your entire organization – to dramatically reduce document processing time and give you the power to easily search, retrieve, route and manage documents from anywhere, anytime.

With Digital Mailroom from CDM, you can leverage:
• Secure, cost-effective document management for all mail and invoices
• Reclaimed space, time and resources
• Custom workflow automation via business rules
• Mobile integration
• Cloud or on-site solution
• Real-time disaster recovery
• SOC II Type II and HIPAA compliant
• Document level security
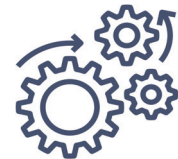• Customized audit trails
• Mail Outsourcing

Incoming Mail Handling

Whether we pick up your mail from the post office or you in-source your mailroom to us, CASO Document Management will open every piece of mail and invoice and scan any and all mail needed. We can also accept incoming email, fax, SFTP, or any other digital files and combine it with scanned paper mail.

Document Scanning & Indexing

Utilizing state-of-the-art document scanners, we will do all the prepping, scanning, indexing, and quality control needed to ensure the highest document image quality. We provide automatic document classification and optical character recognition (OCR) capabilities if you need to automatically extract data from your documents.

Workflow & Distribution

Once released from QC, your document images will be merged with any other incoming electronic files and routed via workflow automation software to the right personnel based on business rules.

PICK UP

We can handle daily pickups of mail at the outlined locations (PO Box, office locations, etc.).

DOCUMENT PREPARATION

Each processed piece of mail will be scanned and indexed based on the client's specifications.

ECM SYSTEM INTEGRATION

If the client has an enterprise content management (ECM) system, each scanned document will be entered into it for workflow processing.

MAIL SORTING

We will process all the delivered mail and exclude pieces of mail based on the rules and guidelines set by the client. These guidelines will also identify which pieces of mail will be sent back to the client.

RECORD RETURN OR DISPOSAL

Based on client preference, the documents will either be sent back to the client, kept in storage, or professionally destroyed with a Certificate of Destruction provided to the client.

The CDM Difference

We are one of the largest scanning services providers in New York and Texas, with operations across the country. We provide the highest quality cost-effective scanning and conversion services for all types of documents – both on-site and off-site at our regional document scanning centers. Today's workflow automation software can solve even the most complex document management challenges quickly and cost-effectively. They can digitize, classify and archive your documents from any incoming mail source and trigger any number of automated workflows in a secure environment to save you considerable time and money.

"**Our Digital Mailroom solution is even more user-friendly than we imagined. There was virtually no learning curve as team members with access to the workflow could master it after a single CDM training session.**

- Gregory Lawler, CIO of GPM Life

Proven Data Security

CASO Document Management (CDM) has completed the American Institute of Certified Public Accountants' (AICPA) Service Organization Control (SOC) 2 Type II audit for the 8th consecutive year. The audit validates CDM's efforts to maintain data security practices of the highest standard for regulated and non-regulated entities alike. CDM has achieved SOC 2 Type II Certification each year since 2015.

CASO Document Management (CDM) has affirmed its commitment to health information security with its company-wide HIPAA Compliance training. The entire CDM staff, including employees at all CDM locations, have received certificates of achievement for HIPAA compliance training – ensuring that all health-related information on medical records and all other documents within its care is managed in accordance with HIPAA privacy rules.

HIPAA, the Health Insurance Portability and Accountability Act of 1996, requires that all healthcare providers and organizations and their business partners develop and follow procedures that ensure the confidentiality and security of Protected Health Information (PHI).

This includes procedures for the private, secure and confidential management of PHI when documents are created, transferred, received, handled or shared. Partners must also provide proof of a formal and documented training program on the handling of PHI while in their facilities.

With its company-wide HIPAA compliance training, CDM meets this federal requirement. Together with its SOC 2 Type 2 certification, CDM provides the highest level of excellence in document security and confidentiality.

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"CDM is committed to the secure and confidential management of its client documents and data. With company-wide HIPAA compliance, our clients can rest assured that their information will be kept secure and confidential while in our care."

- Lana Tamaro, CEO of CASO Document Management

Trusted by Top Organizations

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New York State Industries for the Disabled
CUNY Board of Trustees
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Department of Citywide Administrative Services (DCAS)
Long Island Railroad
Mass Transit Authority
Metro North Railroad
New York City Business Integrity Commission
New York City Police Pension Fund
New York City Department of Education
New York City Department of Environmental Planning
New York City Department of Homeless Services
New York City Department of Planning
New York City Health and Hospital Corporation
New York City Housing Authority
New York City Department of Environmental Protection
New York City Mayor's Office
New York City Department of Construction and Planning
NYS Homes and Community Renewal, State of New York Mortgage Agency
SUNY Downstate Medical Center

About CASO Document Management

CASO Document Management (CDM) has been an innovator in developing practical, cost-effective imaging services and document management systems since 1994. With a management team totaling more than 100 years of experience, they have a proven track record with even the largest commercial and government requirements. CDM offers a full range of imaging services or a comprehensive custom solution tailored to each company, industry or specific project. They support hundreds of regional and national clients in retail, finance, government, healthcare, education, construction, manufacturing and other sectors.