

CASE study

County of San Luis Obispo Case Study

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Julie Rodewald
County Clerk-Recorder
San Luis Obispo County

INDUSTRY

- State & Local Government, County Recorders

LOCATION

- County of San Luis Obispo, California

CHALLENGES

- Outdated microfilm reader printers (up to 50% of machines inoperable at any one time)
- Citizen official record searches limited to on-site retrieval at one location; cumbersome use of microfilm and reader printers
- California law requirements to protect Social Security Numbers (SSNs)

BMI PRODUCTS & SERVICES

- 2,600 microfilm rolls of official records digitally converted
- Digital Reel microfilm scanning solution, including SSN redaction
- Digital Reel Hosting Service with all digital images stored and managed by BMI

BENEFITS

- Legally compliant with all SSNs redacted from public view
- Avoided upfront capital expenditure and ongoing IT management costs with document hosting
- Online, web access makes retrieval much easier and faster for users
- Adjustable grayscale feature enables users to optimize image quality prior to emailing or printing

OVERVIEW

The County of San Luis Obispo Clerk-Recorder's Office is dedicated to providing thorough, easy and compliant access to all public records and documents for its citizens. Like many Recorders throughout the United States, San Luis Obispo County made its official records accessible to the public on microfilm. The County's official records consisted of approximately 3,000,000 images (e.g. patents, deeds, mortgages, reconveyances) stored on 2,600 microfilm rolls.

The cost of maintaining the microfilm archive (e.g. storage, equipment, labor intensive oversight), cumbersome public searches and a legislative mandate to remove Social Security numbers (SSNs) from public view caused the County to issue a request for proposal (RFP) seeking an official records microfilm conversion solution.

After reviewing several potential solutions, the County selected BMI Imaging's Digital Reel due to its conversion accuracy and ability to redact SSNs from public view. Furthermore, the County avoided costly IT infrastructure and management costs by hosting its information with BMI, enabling users from multiple locations to quickly access public records from the Digital Reel web interface.

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Microfilm Conversion Accuracy: Capturing the Entire Microfilm Roll

San Luis Obispo County's key requirements included the assurance that all of their images were digitally converted. The County was seeking a solution that could virtually guarantee that all of their images would be captured during the conversion process.

These requirements presented a challenge for standard microfilm-to-digital conversion solutions. Even with conversion accuracy rates above 99%, standard microfilm conversion-to-digital services can miss thousands of documents because these services rely on procedures that dissociate individual images from the microfilm roll order. Poor microfilm quality, human error during quality assurance, inaccurate indexing and a host of other factors can cause important official record images to be missed during the conversion process.

"BMI's Digital Reel provided the conversion accuracy that we were looking for because it digitally captured each microfilm roll in its entirety. As a result, we had a visual way to ensure that none of our images were lost during conversion," states Julie Rodewald, County Clerk-Recorder. In addition, the County's digital records maintained the same context and order as originally presented on the physical microfilm rolls.

Meeting Compliance Requirements: Redaction of SSNs from Official Records

The protection of personally identifiable information (PII) such as Social Security Numbers (SSNs) is a common requirement for Recorders across the nation. In California, the law prevents the public display and printing of information that contains individual SSNs. As a result of this legislation, the County of San Luis Obispo needed a microfilm conversion solution that could also redact SSNs from its public-facing official record digital archive.

BMI's Digital Reel identified SSNs during the microfilm-to-digital scanning process. Each digitally converted microfilm roll was processed through an optical character recognition (OCR) engine that was able to identify SSNs by detecting the actual SSN character strings and by using the context that often surrounds SSNs (e.g. Taxpayer Identification Number, Social Security #). Each detected SSN was then manually adjudicated for accuracy to eliminate false positives. This process created two sets of information:

- *Public copy*: the first five characters of the SSN were redacted
- *Recorder copy*: the entire SSN is available so that staff could visually confirm the presence of a SSN.

Document Hosting: Reducing IT Infrastructure and Management Costs

San Luis Obispo selected the Digital Reel Hosting Service as a way to avoid a large, upfront expenditure. Rodewald states, "The sheer volume of data that we had converted would have required a significant investment in servers, storage and the IT administrative resources to manage an internally deployed system. The County was able to eliminate the need to worry about the technical management of the solution by outsourcing the entire operation to BMI." San Luis Obispo County Official Records are now stored at BMI's data center operations. The information is stored and managed on an IT infrastructure that offers 99.999% data availability as well as industry-leading disaster recovery and business continuity.

"Prior to Digital Reel, all record retrievals had to occur on-site at our main office from physical microfilm. Now, citizens and San Luis Obispo County staff access records from public and staff terminals across County offices over a secure and fast T1 line. Very little end user training or assistance is required."



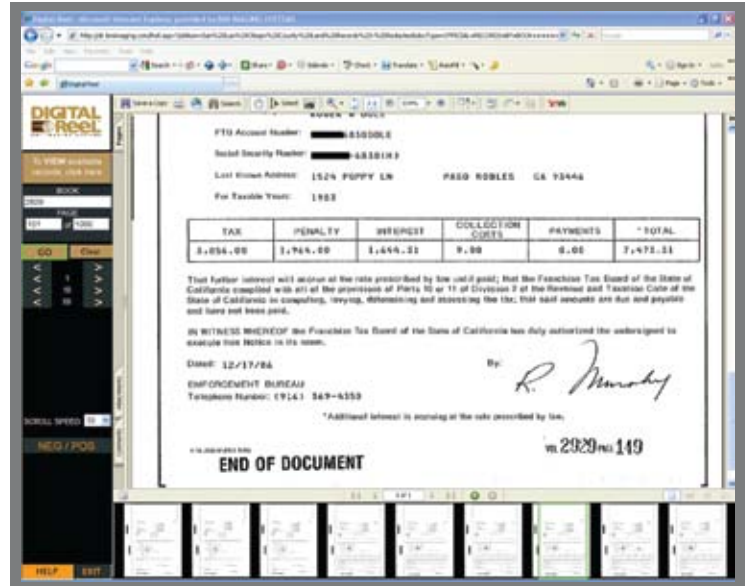
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Expanding Access: Internet-Based Record Search and Retrieval

Rodewald states, "Prior to Digital Reel, all record retrievals had to occur on-site at our main office from physical microfilm. Now, citizens and San Luis Obispo County staff access records from public and staff terminals across County offices over a secure and fast T1 line. Very little end user training or assistance is required." Users log into the Digital Reel web client through a browser such as Internet Explorer. The interface replicates the look and feel of a common reader printer, enabling users to quickly retrieve information by book, page and document number, exactly as before with the physical microfilm archive – only now without the hassle of handling physical microfilm and reader printers.

Digital Reel's interface enables incremental forward and backward scrolling through the virtual microfilm roll. Users can zoom in and out, crop individual images and optimize the quality of each image with a built-in adjustable gray-scale feature. Once the desired information is found and the images are optimized, users can then easily print, email and save information directly from the user interface.

Rodewald continues, "Other Departments through the County such as Assessor, Public Works and Planning can now access records online from their offices. We are currently working on an agreement that would allow outside organizations that need regular access to these records (e.g. surveyors) the ability to log on from their office computers and access required records from the Digital Reel web interface."



Digital Reel Web Interface: users log onto an Internet browser and access their records

In Summary

All of San Luis Obispo's land records now sit within BMI's secure data center, easily accessible from the Digital Reel web interface from several workstations located within San Luis Obispo offices. The County Clerk has an ongoing process where records are archived to microfiche. As these microfiche records are created, they will also be scanned and stored inside Digital Reel, accessible from the same application as the Recorder information.

Next steps

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