

CareLink Cuts Costs with Content Management

Multiple departments at elder care agency increase efficiency and cut costs with Laserfiche ECM

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Caring for senior citizens can be challenging: chronic pain, decreased mobility and a dwindling social network are just a few of the issues that older people—and their caregivers—must contend with. The mission of CareLink, a private nonprofit organization serving central Arkansas, is to connect older people and their families with resources to meet the opportunities and challenges of aging. The agency accomplishes this by:

- Providing in-home services to help homebound older people live in their own homes as long as possible.
- Helping active older people stay fit, healthy and involved through senior center programs and volunteer opportunities.
- Providing family caregivers the resources and support they need to maintain their own lives while caring for older loved ones.

But with 19,000 clients, CareLink was contending with a challenge of its own: filing, storing and accessing customer charts and other documentation in a timely and efficient manner.

Paper's Pain Points

According to Luke Mattingly, CareLink's chief operation officer, the agency employs 740 employees, with many of them providing home-based customer care. Some of these field employees live and work nearly 100 miles away from CareLink's main office, which made filing and accessing customer charts a time-consuming and difficult task—one that took away from the face-to-face time they could spend with customers.

“Our employees are kind and compassionate people who entered this field in order to help senior citizens,” says Mattingly, “not spend hours filing and retrieving reports.”

In addition to staff productivity concerns, CareLink's paper-based processes also caused delays when it came to funding. As a nonprofit, the agency receives funding from a variety of sources, including:

- Medicaid.
- Federal awards.
- State assistance.
- Private insurance companies.

- Personal donations.
- Private individuals (fee for service).

“We have thousands of customer charts and documents related to a variety of funding sources, and we get audited by third parties in conjunction with their funding requirements,” explains Mattingly. “Paper is just not conducive to quick and easy audits, particularly in the document collection phase.”

Electing to Go Electronic

In 2006, CareLink decided that enough was enough: the agency needed to find a solution that would allow it to do away with paper records and manage electronic content instead.

After evaluating several systems, CareLink found that “Laserfiche had the features and operational capabilities we were looking for, including excellent security, comprehensive records management and ease of use.” Plus, adds Mattingly, “Laserfiche was offered by Datamax, one of our long-time, trusted vendors, and we knew that we could count on them to implement the system according to our needs.”

How ECM Helps

Implementing an enterprise content management (ECM) solution has transformed the way CareLink handles customer information in a number of ways:

- **Electronic customer charts increase employee efficiency.** With Laserfiche, field employees no longer have to travel to the main office to retrieve and file customer charts, which greatly enhances their efficiency. They simply access Laserfiche via a Citrix connection and find and file electronic records in the Laserfiche repository. According to Mattingly, this ability to capture documents in the field saves significant staff time. With distributed capture, CareLink has created a five-day filing rule that ensures data is uploaded to Laserfiche on a regular basis. This keeps charts current and protects against the possibility of losing files due to local hard drive failures.
- **Automated filing process increases organizational efficiency.** Using Laserfiche Quick Fields and Workflow, CareLink has created a quick and easy way to capture, index and auto-file documents in its Laserfiche repository. “Quick Fields captures our customer charts, saves them to the correct location and extracts index field data from specific areas of our forms in order to pre-fill our templates. Workflow further enhances the process by automatically populating template data based on folder name/designation. The automated filing process has been marvelous at eliminating manual data entry and saving staff time,” Mattingly reveals.
- **Enhanced security eases HIPAA concerns.** Prior to implementing Laserfiche, customer charts were kept in a large file room where it was impossible to be 100% sure that personnel only had access to the records of their assigned customers. In addition, staff sometimes forgot to record when a file was removed for review. “The granular security controls in Laserfiche eliminate the possibility that employees can view customer files

they're not supposed to see," says the COO. "The system also provides an audit trail so that administrators can easily see all the activity that's taken place on any given file."

- **Easier access to information eases audits.** "In conjunction with our funding requirements, CareLink is audited by third parties on a regular basis," Mattingly explains. "Laserfiche sped up the process of retrieving documents when those entities show up unannounced." The system has also simplified internal audits that are designed to ensure that various departments and individual employees are completing an appropriate amount of work. "With Laserfiche's advanced search capabilities, we can quickly determine the number of documents filed by any employee or department during a given date range. This has been very helpful and saves us a lot of time," Mattingly says.

But customer charting isn't the only area of agency operations that has been enhanced by ECM. Finance uses Laserfiche to manage financial documents, check registers and payables invoices. The fundraising department uses it to keep track of content such as proposals and thank you letters. HR uses it to control personnel files, time sheets and employee training files. In addition, the repository also houses organizational policies and procedures, letters, correspondence and individual employee files.

"Laserfiche started out as a solution for electronic charting but it's grown to encompass so much more," Mattingly says.

Return on Investment

According to Mattingly, Laserfiche has enabled CareLink to cut its paper consumption in half. Over the past three years, paper savings and the reduction of off-site storage costs have completely covered the cost of purchasing the system. "Over the next seven years," Mattingly states, "eliminating off-site storage entirely will offset the annual maintenance fees for Laserfiche."

Mattingly reminds us, however, not to forget about the cost savings associated with the efficiency gains CareLink has gained through its use of Laserfiche: "We estimate a 40% efficiency gain for audits, for example, and our field staff has absolutely seen a productivity boost. Although we haven't assigned these gains a dollar value, this is where the real savings lie."

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