

Neighborly Care Network

Key Benefits

- Created an electronic medical record system to meet federal and state mandates
- Reduced costs of administration, storage, supplies, faxing and overnighting of documents
- Improved staff efficiency, freeing resources for additional client services
- Streamlined processes by giving vendors and agencies controlled access

API Solutions Integrated

- OptiView® ECM
- OptiView Web™
- Form Processor™
- Fujitsu fi-6130 scanners

Neighborly Cares for More Seniors in More Programs with Efficiencies and Cost Savings from an Electronic Document Management Solution from Advanced Processing & Imaging

Based in St. Petersburg, Florida, Neighborly Care Network is a pioneer in elder care, with milestones including the first federally funded Meals on Wheels program and the first adult day care center in the United States. Currently, the organization serves 8,100 clients across the state of Florida.

Challenge: Paper-based processes blocked expansion of services and clients

Neighborly Care Network, which operated in a paper-based environment for client records, services documentation, reimbursement and reporting, found itself “squeezed from both sides,” according to CIO David Lind. Internally, the organization was spending an inordinate amount of time handling huge amounts of paper. The majority of employees spent a third of their time on administration. Filing, copying, faxing and searching for documents were consuming precious resources that could be spent on direct client services. “We operate 112 Meals on Wheels routes each day, and each one required a paper route sheet given to the driver and used as documentation. This generated 42,000 route sheets per year – and that’s only one of our many programs.”

Neighborly also found itself constrained from expanding its client base because employees were bogged down with paper. “Our Meals on Wheels waiting list has jumped to 400 people, for example,” Lind noted. “We needed to boost efficiency to handle more clients without adding staff.”

High costs were also a major drawback. In the CHOICE program, an alternative to nursing home care, client care records comprising 500-600 pages were regularly overnighted between Neighborly’s headquarters and care managers in Florida at a cost of \$100 weekly.

Externally, Neighborly Care Network faced new federal and state mandates to transition to electronic documentation. The organization wanted to become a PACE (Program of All-inclusive Care for the Elderly) center, delivering

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David Lind, CIO,
Neighborly Care Network



outpatient medical care at its adult day care center, but needed to implement an electronic medical record (EMR) as a condition of the contract with Medicare and Medicaid.

Solution: OptiView ECM for electronic document management

Neighborly Care Network made the decision to move from paper to electronic document management, and looked for an enterprise solution to meet its specific requirements. These included exceptional ease of use to accommodate staff and volunteers with varying levels of technology expertise; remote access over the Web; and integration with the CH Mack Q Continuum System™ for case management, Sage Abra Suite for human resources administration and payroll and the Microsoft Dynamics™ SL financial system.

Lind said, "We selected OptiView® ECM and OptiView Web™, as well as Form Processor™ for scanning forms and uploading them into the system. In addition to delivering a complete solution, including Fujitsu fi-6130 scanners, the API team kept their promise to make sure Q Continuum and our other applications work seamlessly with OptiView."

The implementation went smoothly and quickly, according to Lind. "Our staff was able to convert many years of paper files into OptiView in just six weeks, and training on the system takes only about an hour."

Benefits: Providing more services with greater efficiency, lower costs

The change from paper to electronic documents has streamlined and

accelerated processes, while saving money in many areas. Instead of searching for paper records, Neighborly staff can access required information in seconds, thanks to the intuitive search functionality of OptiView ECM. With a central repository, there is no more confusion about which is the latest version of a document. OptiView ECM has reduced the turnaround for vendor invoices from three weeks to three days; eliminated \$5,000 in FedEx charges per year; and replaced needless faxing.

Web-based access to OptiView offers even greater process optimization. "Major vendors have direct, controlled access to the system so they can track invoices and update information," said Lind. "We are no longer letting paper drive our processes." A major benefit of OptiView is the ability to share records and documents over secure connections, thereby maintaining compliance with HIPAA.

The API solution also enabled Neighborly to qualify for the PACE program by serving as the repository for electronic patient records. "OptiView allows us to maintain complete and up-to-date EMRs that are immediately accessible. Thanks in large part to the successful OptiView implementation, our upcoming approval as a PACE center was the fastest in the nation."

Lind concluded, "OptiView is a critical component of Neighborly's business process reengineering. We've gained efficiencies, saved money and enabled our limited staff to be more effective in providing existing and new services to our client community."

For more information, please visit www.apimg.com or call 800.430.7011.



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Advanced Processing & Imaging, Inc.

Founded in 1996, Advanced Processing & Imaging (API) develops software solutions that enable public and private organizations, across a range of industries, to implement an efficient and effective paperless environment. The API enterprise content management (ECM) portfolio includes document management and imaging, records management, workflow and agenda administration. The company is a certified IBM® Business Partner, Microsoft® Gold Partner and Microsoft® ISV. Powerful solutions, the ability to seamlessly integrate with line-of-business applications and world-class customer care set API apart from their competition.

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