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Case Summary

Primaris is a non-profit healthcare consulting firm located in Columbia, Missouri that provides and develops innovative business solutions to improve healthcare delivery and outcomes. Founded in 1983, Primaris serves as Missouri's Medicare Quality Improvement Organization (QIO) and provides health insurance counseling to seniors through the CLAIM Program. Using the data capture and document management expertise of User Friendly Consulting, Inc (UFC, Inc.), Primaris was recently able to implement a robust document management system (Laserfiche) that allows them to collect and store a large number of medical records from a variety of health care providers.

The Opportunity

In late 2008, Primaris embarked on a new, for-profit project that required the collection and storage of a large number of medical records from a variety of Health Care Providers. These records needed to be organized, classified, and stored in a manner that would give both Primaris and the Health Care Providers easy access and security. To this end, the IT department contacted UFC, Inc. with a request for assistance in creating a solution that was robust and flexible, but at the same time offered an ROI that would enable the new business unit to become profitable in a short time. After some initial fact gathering and consultation, it was decided that a solution consisting of a suite of products by Laserfiche would be implemented.

The UFC Solution

After an extensive inquiry process that included both a needs assessment and a series of live demonstrations, it was determined that the Laserfiche solution would provide Primaris with the most cost effective, secure, and feature rich solution, while at the same time, providing a rapid ROI for the new business venture. Laserfiche solutions combine robust, flexible document imaging and management capabilities in a simple and intuitive graphical interface. All solutions components were developed by Laserfiche and are designed specifically to work together. This allows for a single point of contact for all configuration, support, and training. Maintenance and version upgrades are simplified significantly because new releases are inherently compatible with all system components. All products share a user-oriented design philosophy that results in interfaces that are easy to understand and use.

In an effort to provide Primaris with a flexible, robust and cost effective solution that could be scaled, UFC recommended and implemented a solution that consisted of the base Laserfiche document management functionality along with web access capabilities, Quick Fields data extraction modules, and import agent. Web access gives Primaris the ability to roll out high-volume Laserfiche access without increasing its organization's application support burden. Quick Fields data extraction modules provide

the ability for Primaris to pull data using Zonal OCR from key data fields and then the data that is pulled is used to lookup the rest of needed fields in a database. After the implementation, UFC worked with Primaris to train them and provide support for ongoing needs and to make any necessary changes to the system.

UFC – Committed to the Ongoing Success of its Customers

UFC, Inc. is committed to helping its clients, such as Primaris, to meet its organizational goals and bridge any gaps that may impede their document management progress or which may result in inefficient processes. To that end, UFC recently worked with Primaris to provide them with a custom coded solution that addressed an image resolution issue that they were encountering. Additionally, Primaris is expanding their Laserfiche system and will be working with UFC, Inc. to implement a workflow solution. Andrew Johnson, Director of IT at Primaris states “The Laserfiche application has helped us as an organization to move to a document management solution for the benefit of our clients, but UFC has made the difference maker as they have stood by our side and provided us innovative solutions to various issues that we have encountered on our document management journey. Additionally, they are always responsive to our questions and any support needs that may arise. We appreciate our partnership with them.”