



EDMS Case Study – MHA Care Group

MHA Care Group management was looking for a document management system to release space taken up by filing cabinets, to improve the effectiveness of filing of residents' records, and to provide an efficient and automated solution to the problem of filing large volumes of paper letters written to residents.

About the client

MHA Care Group (originally Methodist Homes for the Aged) is a not for profit organisation providing 60 high quality care homes and 30 other housing schemes throughout England and Wales, along with 40 community support projects and Live at Home support for the elderly. Services include residential care, nursing and specialist dementia care, day centre & respite care for the elderly. MHA also provides Management services for other care organisations.

The Problem

MHA provides care for over 6500 older people, and storing efficiently all the records for such a large group of residents is a major challenge. Government rules are increasingly stringent in relation to record keeping in care homes, and compliance with the Data Protection Act requires a high standard of security for personal information. In addition, a regular letter is written to all residents, and MHA was seeking an automated solution to the problem of filing a copy of each letter on every recipient's file.

The Solution

The customer has installed a 10 user File Stream Document Management network system. Initially a specialist bureau undertook back-scanning on behalf of MHA, and a Xerox Workcentre Pro 35 scanner is now used in the Head Office to scan paper documents. These electronic documents are then filed in File

Stream Document Management in 60 virtual filing cabinets, one for each care home. 2400 Service Users' records have been indexed by reference, surname, type of correspondence, and whether still current (True/False).

The next phase will involve 1000 Sheltered Housing Service Users, and Local Authority contract and invoice papers.

In addition, Filestream Ltd has written a customisation module to enable mail-merge letters to residents to be automatically indexed to each resident's electronic record.

Head Office staff can search for, view and communicate scanned residents' records, paper and electronic documents (Emails, Word & Excel documents) quickly, provided they have the appropriate permissions in File Stream Document Management.

The Benefits

The Resident Charges Manager of MHA Care Group considers the following as the main benefits of installing File Stream Document Management:-

- Space has been saved because fewer filing cabinets are required.
- A regular and large volume of letters to residents can now be automatically filed to residents' electronic records rather than time-consuming paper filing.
- Documents are retrieved more quickly and more accurately.
- Documents are more secure, and regular back up ensures protection from disaster.
- More than one person can view a document at the same time.