

# case study



UNIMED

## Health Services Provider Goes Digital

*Brazilian health insurance company, UNIMED implemented DocuWare to digitally manage 1.3 million patient accounts and over 1.8 million pages of information a month. Utilizing advanced technology, UNIMED was able to digitize and microfilm records simultaneously, meeting federal record retention laws. The new system eliminated courier costs, reduced duplicate procedures and improved billing practices, resulting in a Return on Investment in less than one year.*

UNIMED, the largest health insurance company in the south of Brazil, has 30 offices throughout the state of Rio Grande do Sul, spread out over 800 kilometers (500 miles). Each UNIMED in-network physician is a part-owner of the UNIMED Federation, so the doctors have a vested interest in the efficient operation of the organization as a whole. Each office operates as if it were a separate company; however, documentation is shared among all offices.

## Documents

UNIMED maintains volumes of documents including medical records, hospital charts, doctor statements and more. In Brazil, the original document cannot leave the office of origin, so copies of patient records and bills are sent back and forth between offices for processing every 15 days. This exponentially increased the number of documents UNIMED maintained and resulted in multiple copies of the same information at several different locations.

## Work Process

When a patient visits an in-network UNIMED physician, the medical records and billing documents are processed and stored at the local UNIMED office. If a patient seeks a second opinion or chooses to see a UNIMED doctor in another city, the two offices must bill each other for the visit. Because transferring and maintaining documents is such a large complex process, when patients get a second opinion many of the tests are repeated two to three times since the original test results are not easily available to the second physician. This phenomenon was a drain on the organization's bottom line and efficiency, and contributed to the huge amount of records UNIMED needed to maintain.

## Solution Requirements

UNIMED knew that they needed to implement a digital document management system in order to control costs and improve service to their patients. Brazilian Federal Law 5433 from 1968, regulated by decree number 1799 made in 1996, requires that all paper documents must be microfilmed in order to be destroyed. In order to eliminate their

reliance on paper records, move to a digital information system and improve their work processes, UNIMED needed an efficient way to microfilm and digitize records simultaneously.

After evaluating several systems and vendors, UNIMED choose to work with Geraldo Streck Gerenciamento de Imagem e Informação, an Authorized DocuWare Partner, and implemented DocuWare because it was a robust solution proven to work with high volumes of documents.

## Solution

Using a unique hybrid imaging solution, each of UNIMED's 30 offices captures information with a Kodak i9610 Archive Writer to produce digital images which are then used to create archival microfilm without manual assistance. The digital information is indexed and stored on a secure server managed by Brasil Telecom, a communication services provider. Using DocuWare's AUTOINDEX module, the microfilm location number such as: Roll 22 Frame 75, is automatically added to each image as an index term. Each of the 30 offices has access around the clock to the knowledge stored electronically in DocuWare and can search and view documents online as needed. The microfilm copy of the records is stored at a central location.

DocuWare's strong security features allow UNIMED to set access rights and maintain patient privacy while providing physicians with an efficient, easy way to share test results and other records. With 30 offices each scanning 3,000 pages per day, UNIMED electronically processes over 1.8 million pages per month. Each night the server synchronizes the information providing each office access to complete documentation.



### The Task

- Improve billing & information exchange between offices
- Reduce costs and inefficiencies of a paper system
- Go digital while meeting federal law requiring microfilming
- Avoid duplicate medical procedures

### Appointed Modules

- ACTIVE IMPORT
- AUTOINDEX
- RECOGNITION
- INTERNET-SERVER

### The Benefits

- Digitized and microfilmed records simultaneously without intervention
- Inter-office sharing of patient information
- Time to invoice reduced to one day
- Eradicated massive paper archives and improved record security
- Legal litigation avoided with secure digital archive in place

## Benefits in Detail

### Patient Benefits

Patients' confidence in their local physician has improved now that their complete medical record is instantly available the moment they walk in the clinic door.

The privacy of over 1.3 million patient accounts is managed with DocuWare's strong security and access features, providing peace of mind for both physicians and patients alike. In general, each office can only view patient files that originated at their branch unless other permissions have been granted.

### Physician/Office Benefits

As a result of implementing DocuWare, patient care has improved because primary care physicians can choose to share test results and other information with another physician offering a second opinion.

Secure medical records help physicians meet medical record retention laws requiring hospital records to be kept until 20 years after death. Physicians can be prosecuted if they do not maintain medical files but thanks to DocuWare, files will be available well into the future helping to avoid legal action. In-network UNIMED physicians that operate their own clinics can store patient information in UNIMED's DocuWare system without incurring any costs. This financial incentive to physicians assures medical records are in one place regardless of origin and speeds the medical billing process. Eliminating physical paper files at each location has provided more space for offices and patient exam rooms allowing expansion without additional costs.



### Corporate Benefits

The cost savings realized from eliminating document shipping costs alone has allowed UNIMED to see a Return on Investment in less than one year. Significant cost savings have resulted from the elimination of duplicate procedures and the ability to track the distribution of expensive medications. With DocuWare in place, Accounts Receivable time to invoice has decreased by 14 days now that information is exchanged between offices daily. All of these cost factors combined are improving UNIMED's bottom line.

Additionally, external audit costs have decreased since auditors can be given a user ID which provides access to information right from their own office, thus eliminating the 'each location' fee. As another benefit, UNIMED can track which documents the auditor reviews and use this information to improve their processes.

"Providing 30 offices in different cities with up-to-date documents is a huge task by itself, but when UNIMED decided to capture documents daily from each location where they are generated, only a robust and stable software solution could do the job. The choice

for DocuWare was an easy and efficient answer for a 1.8 million documents per month project, allowing users to access the information through the Web from any location," said Mr. Marcelo Streck of MGS, the Authorized DocuWare Partner. The success of DocuWare for the Federation of UNIMED in Rio Grande do Sul has inspired other UNIMED Federations to adopt the system. Today the 30 offices in Rio Grande do Sul can efficiently exchange information with 17 offices that make up the Sao Paulo UNIMED Federation. Other UNIMED Federations are examining the solution. If adopted, a document exchange process would be possible between each Federation across Brazil. Implementing DocuWare brought so many easily identifiable benefits to UNIMED that it was recognized by The National Center for the Development of Information Management (CENADEM) for its unique hybrid electronic document management solution.

Dr. Paulo Gonçalves, IT Director for UNIMED said, "DocuWare's document management system is helping us to daily control the medical expenses of our health insurance plan, it's been a fundamental tool in managing our whole operation."

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*Dr. Paulo Gonçalves,  
IT Director,  
UNIMED*



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