



## M-Files Success Stories 2009

### **The Practical Path to a Modernized Medical Office**

*NW Healthcare and Wellness Center previews the coming wave of fully electronic file storage for the small medical practice*



One of the strategies advanced by the new administration in Washington to reduce health care costs is modernization of the information technology (IT) infrastructure of care providers.

President Obama's 2009 economic stimulus package, otherwise known as the American Recovery and Reinvestment Act (ARRA) devotes nearly \$20 billion in incentives to hospitals and physicians to implement electronic health record (EHR) systems. Surprisingly, while much of commercial and personal life has gone online, only about four percent of the 200,000 small practices (made up of 10 doctors or less) owns or make substantial use of an EHR system. Most still store their patient records in rows of file cabinets.

Dr. Stephen Smith of NW Healthcare & Wellness Center, for one, has welcomed the move to digital storage. "My office is only about a thousand square feet, so space is at a premium. And I didn't want to have to constantly sort through folders." A practitioner of environmental medicine often dealing with allergy cases, Dr. Smith reviews patient charts through an electronic medical record (EMR) system provided by ChartConnect, a popular provider of EHR software, and conducts his billing through another common database application, Medisoft.

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NW Healthcare*

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But ChartConnect and Medisoft, Dr. Smith says, "only cover a fraction of the document problem typical of single-doctor practices." While an EHR system conveniently retrieves patient health histories, NW Healthcare accumulates a mountain of other types of paperwork -- for insurance, banking, taxes, or reference. "There were many other records I would have to look up all the time and I wanted to have them stored too. I give handouts to patients for diet recommendations, for example, like a gluten-free allergy sheet," he says. "I needed a way to access this information on the spot."

A physician's desk that once was sometimes overwhelmed with clutter is now clean and close to paperless, featuring only a PC, scanner, and printer. Dr. Smith now manages every piece of documentation required for his practice electronically, even his daily mail.

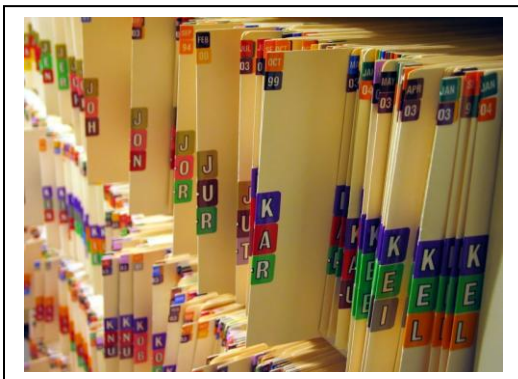
Dr. Smith found one of the simplest – and most affordable -- ways to manage documents comprehensively; one that integrates directly with his Medisoft database and one that is becoming especially relevant to the tens of thousands of doctors across the country who will move toward digital document handling over the next few years.

### ***M-Files***

The astonishingly simple but powerful addition to electronic medical records is M-Files, a document management solution by Motive Systems. M-Files seamlessly integrates with the Microsoft Windows operating system and Windows Explorer, the familiar tree of folders, subfolders and dialog boxes displayed by Windows when opening or saving files from applications from any Windows application, such as Word, Excel and so on.



What makes the M-Files concept straightforwardly simple is that it overcomes the limitations associated with the traditional concept of a hierarchy of nested folders and subfolders. The typical Windows scheme of file organization allows users to create new folders and name files anything they like, but over time, this freedom leads to the inconsistent electronic discipline that seems endemic to the small business. File paths create a sprawling and often haphazard collection of folders on hard drives and servers that becomes more and more disorganized and chaotic as more files and folders are added over time. Usually no one really knows where everything is, and even those who created a file or folder are often liable to forget.. Time is regularly wasted trying to recall the naming conventions of documents saved months ago, or whether a file is in this subfolder or that. With more co-workers, the potential for confusion grows when file versions and folders are duplicated on multiple hard drives and servers in different folder structures.



“Whether it’s traditional paper filing or saving documents on a PC, you make one folder and then six months later you can’t find it, so you make a new one and name it something else,” explains Dr. Smith. “A year down the road, you’ve got two or three folders with similar information. It becomes a mess.”

Instead of clicking through a file path while saving a file, M-Files asks the user for a few

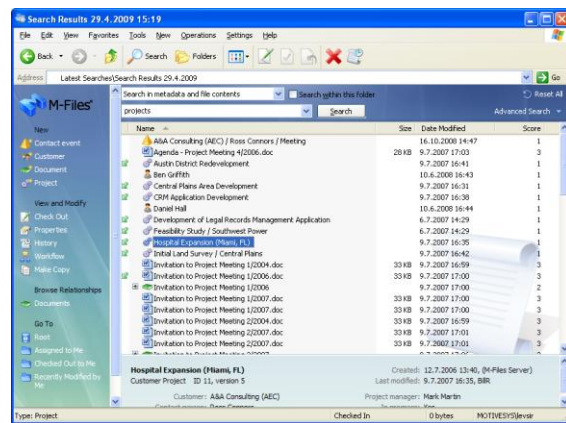
simple keywords about the document, or descriptive properties known as metadata, and then quickly locates the document. For his nurses, Dr. Smith can easily create a workflow for certain types of common recurring documents, specifying a number of category terms, or keywords. Lab results, for example, require not a file path or name, but the patient name and billing number, among other relevant search fields, such as the type of test the lab name, which they can quickly select from drop-down menus.

Within the familiar Windows Explorer interface, M-Files consistently enforces organizational processes, like check-in/ check-out procedures and specifying required metadata when saving to ensure documents are always categorized correctly and efficiently and to avoid losing data when one person overwrites the changes made by another.

### ***Quick retrieval of any file***

When this simple approach is applied to every type of document generated among all computers, NW Healthcare builds a powerful database that tracks all pieces of information relating to the practice. The result is immediately accessible documents, which leads directly to higher productivity and better service for patients.

“M-Files makes finding anything so much easier,” he says. “Anything I need is right at my fingertips. If the patient’s name is Smith, I can type in S, M, I, and usually that’s enough to bring up the patient’s recent care, history, billing, or anything else that has the name or patient number associated with it.”



Find Any File Fast  
(Click [here](#) to enlarge the image.)

The M-Files flexible interface allows Dr. Smith to intuitively narrow in on the specific file he’s seeking by clicking on the metadata categories. It also allows him to set up more specific or sophisticated searches. For example, he can call up and compare test results among young autistic patients by searching by name of the specialty lab that conducts them.

“I can’t even imagine how I would do it without M-Files,” Dr. Smith says. “I would have to do a search on all the kids that have autism and go through each of the files. It would take hours and hours of work. That is what the increased power that M-Files gives me.”

One effective technique Dr. Smith has discovered with M-Files is to scan nearly every hard copy document – not only charts sent from other physicians, but

invitations to conferences he might want to attend or a pertinent clipping from a journal article. Dr. Smith drops piles at a time onto his compact office scanner, a Fujitsu ScanSnap. As the items appear on screen, he assigns each document the appropriate M-Files keywords and properties efficiently categorizing each document in the scanning process. The scanner, like most other scanning systems now on the market, comes with software that automatically converts the scan to PDFs with searchable text, which makes the content accessible through M-Files searches.

### **Linking M-Files and Medisoft Patient Numbers**

The retrieval capability of M-Files is multiplied in a medical setting when the keywords and metadata are directly correlated with the Medisoft database, as they are at NW Healthcare. M-Files can then use all the fields in Medisoft attached to a patient ID – billing number, social security number, address, past physicians, and so forth – as identifiers for all intra-office documents. Thus all documents generated with a “patient name” tag in M-Files are now also searchable by these attributes. Plus, this basic patient information from the existing Medisoft database pops up in M-Files without having to be entered every time while saving the file.

“A key factor in getting dramatic improvements in efficiency and productivity from M-Files is hooking it up to your existing database, in my case the Medisoft system. The M-Files team will help with that. Their engineers did it all for me, and they hooked everything up very quickly. Once you have the databases linked into M-Files, you will be able to find things very easily because you can track the patient billing number throughout all documents.”

While M-Files technicians are available to assist with linking M-Files with existing EMR databases, installing M-Files to organize office documents is something anybody can do. As far as implementation goes, it could not be simpler.”

### ***Paperless workflow for medical facilities of any size***



Hardware and software included, NW Healthcare’s computing overhead is remarkably low, but its information handling is more sophisticated than many major U.S. hospitals. Prior to adopting M-Files, Dr. Smith had researched many brands of document management software, but didn’t find an alternative that offered the comprehensiveness and power of M-Files, and especially not at the same price. “Several that I looked at were between \$8,000-\$15,000, which would have been prohibitive for our office. They also seem to take more time to implement and maintain.” M-Files, he says, is competitive even with the price of traditional medical folders and drawers.

The system provides a simple file solution that places all of his practice's data into a single repository, accessible to his assistants, and available to him -- even at home or on vacation -- without the need to synch his laptop to his office server. M-Files is limitless and expandable, regardless of the size of the organization.

"A large medical clinic could use the M-Files scheme just as effectively," Dr. Smith says, although he sees the biggest advantages for individual doctors as more and more private practices move towards digital document control.

"Typically, when you think of a medical file management system one often thinks of a larger office, but it makes more sense for a smaller office because you have fewer people and less space to handle the paperwork," says Dr. Smith. "M-Files makes my office so much more efficient. I have all my records and handouts at my fingertips, which I can print off while the patient is sitting there."

The efficiency of electronic records has a very intangible benefit for Dr. Smith's patients: reassurance. "Having all the materials ready for them makes it look like you're organized and you have your act together. It's about providing quality service."

### **About NW Healthcare and Wellness Center**

Northwest Healthcare and Wellness Center, PLLC is the practice of Dr. Stephen Smith specializing in allergy and environmental medicine in Richmond, Washington. Dr. Smith practices holistic medicine, combining traditional medicine with alternative or complementary medical techniques to offer patients a broad range of treatment options. Northwest applies this philosophy in low dose immunotherapy (LDA) for allergies, bioidentical hormone replacement strategies, detoxification, nutritional support, chelation, and mesotherapy. For more information, please visit: [www.nwhealthcare.net](http://www.nwhealthcare.net).

Find out more about M-Files for your office at [www.m-files.com](http://www.m-files.com).