

Streamlining document management at Optimax



Optimax

Country: UK

Industry: Optometry

Profile: The UK's largest laser eye treatment specialists. 18 clinics and 250 staff across the UK.

Key drivers: Reduction of paper use and document duplication. Improved access to patient files.

Optimax is the UK's No. 1 laser eye treatment specialist, offering a range of procedures at 18 clinics, employing over 250 staff throughout the UK.

Founded in 1991 to provide the highest possible quality of treatment to everyone. Optimax's specialist eye surgeons have performed over 220,000 procedures to date; double the number of treatments compared to any other UK provider.

Too much paper

Prior to deploying Document Manager, Optimax's entire UK operation relied on a paper-based system to handle its patient documentation, including all patient consent forms, marketing feedback forms based on questionnaires completed by patients, and building documentation.

With the company conducting an average of 2,500 consultations each month, this represented a very large volume of incoming documents. Under the paper based system all patient consent forms were completed by the patient at the treating clinic and then shipped to a central storage repository in Newcastle for filing. This system did not give Optimax staff the access to patient records that they required to deliver the high levels of service that Optimax demanded. Therefore staff also maintained a local copy of each consent form in the clinic. This duplication was time consuming and made it very difficult to ensure all information being employed was up-to-date. Staff were also unable to share patient files efficiently under this system, which created frustration and delays.

Optimax wanted a document management solution that would streamline the way it handled all of its operational, and client information, and which would allow Optimax staff to spend less time looking for information and more time getting on with serving customers. The system had to provide full central storage and management of multiple document types, and be very easy to use for Optimax's 250 UK staff.

CASE STUDY - Document Manager - Optimax



With 18 clinics across the UK, Optimax is using Document Manager for clinical administration, practitioner diary management, human resources, marketing and estate management

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Benefits of Document Manager

- Central management and storage of documents
- Reduced requirement for filing space
- Removal of locally stored duplicate documents
- Tight control of document security
- Records are kept up-to-date in multiple locations simultaneously
- Staff have access to more up to date information with legacy systems
- Several staff can view a client file simultaneously

“The system will be used to provide practitioner records for doctors and optometrists, including medical certificates. This will allow us to keep records up-to-date in multiple locations simultaneously,” said Nick Russell, IT Director, Optimax.

The Document Manager solution

Document Manager is a powerful and comprehensive document management and workflow solution. It centrally manages the flow of documents through the organisation, maintaining tight control of document security and editing, while providing on-line access to authorised users via the web.

With the Document Manager DM and workflow system deployed across the enterprise, Optimax staff no longer need to store a paper copy of documents in each clinic. Staff now have access to all the documents they need electronically through Document Manager at any Optimax location, at any time.

With 18 clinics across the UK, Optimax is using Document Manager for clinical administration, practitioner diary management, human resources, marketing and estate management. The system is also being used to provide practitioner records for Doctors and Optometrists, including for example, medical certificates. This allows Optimax to keep these records up-to-date in multiple locations simultaneously.

Document Manager is also being deployed in other areas like human resources where it is used to more effectively manage employee records including references, Criminal Records Bureau forms and internal HR documentation.

Infonic’s document management solution now stores and provides access to all Optimax’s marketing feedback forms, which are based on questionnaires completed by patients, and stores all of the organisation’s building and facilities documentation.