



# Automated Data Management System with Everteam - A Comprehensive Solution like no other



Client  
Sector  
Product  
Application

**Caisse Mutuelle Socio-Médicale (CMSM)**  
**Non-Profit Organization**  
**Data Capture, Documents Management and embedded document viewer**  
**Document Management System**

With technology influencing businesses day by day, organizations have restructured their operations especially when it came to paper management and reducing the amount of paper consumed. In response to this change, Caisse Mutuelle Socio-Médicale (CMSM) Offices deployed Data Capture and Document Management Solutions from Everteam. CMSM offers its services to over 50,000 customers and receives numerous medical claims yearly.

These medical claims provide very crucial information that Mutual Funds need in order to evaluate their adherents administrative and medical files.

With the adherents list growing the existing archiving system is no longer convenient. What action do you think CMSM took to tackle this problem which was increasing operation costs, demotivating employees and slowing the process of services offered?

## About CMSM

The Socio-Medical Mutual Fund, known as (CMSM) was founded in 1992 as a non-profit organization, having for objectives solidarity and collaboration among all adherents to share medical and hospitalization expenses, and to support them and their families with social benefits, school endowment and other aids. CMSM's mission is to provide access to a good quality of medical care, achieve justice and equality among all adherents and be at the forefront of spreading the spirit of mutuality in the Lebanese society.



## Business challenges

CMSM were facing many challenges operating the business which had major effects on the performance:

- Lacked control on business operation
- High operating costs
- Demotivated employees
- Slow services

Patients have rights to their medical claims; therefore it is the duty of the company to make sure they practice safe and secure record archiving. Everyday CMSM had more customer data, new claims, policy documents and detailed financial and medical information.

A medical claim was never only one document. It would be accompanied by an x-ray, medical report, photograph, reports from laboratories and so on. CMSM Decided to replace their existing system in order to convert its growing data to digital records and move them to an archive where the right people can safely and cost-effectively access it at the right time.

They decided to contact Everteam to help them transform to an intelligent organization, where struggling with a significant amount of paperwork was no longer a problem.

## The everteam solution

Data Capture, Documents Management and embedded document viewer.

For the many reasons mentioned above, CMSM decided to deploy two core solutions from Everteam along with an add-on.

As CMSM was producing big data on a daily basis, therefore the first step needed was to capture and convert high volumes of the physical documents that existed at CMSM through, everteam.capture a data capture solution for high volume scanning.

As soon as all the documents were transformed to digital documents, CMSM was able to manage the entire lifecycle of the content through everteam.document.



Many managers feared the process of switching to an entirely new method of managing files and documents as they believed it can be anxiety-producing, but often for the wrong reasons. Deployment of solutions by Everteam is a process far easier than expected, therefore there was no need to worry about losing valuable time during the transition stage.

After the successful deployment, CMSM was left at an advantage over the other businesses it competes against. This was due to the fact that many have not automated their business process yet, or have but failed.

# Benefits

The universal viewer which was added as an extension, enabled users to view the documents on business applications while enabling annotations, modifications, and others. All the work was centralized and organized in a secured place where access was granted to authorized people only. Users were able to identify when the medical claims could be destroyed and when they should be retained.

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## Become an Intelligent Organization

All documents are centralized with important features to assist in categorization, tagging and rating files automatically.

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## Reduced Physical storage-lower costs

Paying for storage space over a period of time is very costly. Therefore when you scan and upload paper that is taking this space, cost and storage space decrease.

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## Interactive Dashboards

Top Management was able to easily monitor specific budget expenditures and comparing budgets.

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## Error Margin minimized

Errors and risks related to manually entering data eliminated, since all reports are now automatically printed on the pre-defined templates.

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## Improved Customer Service

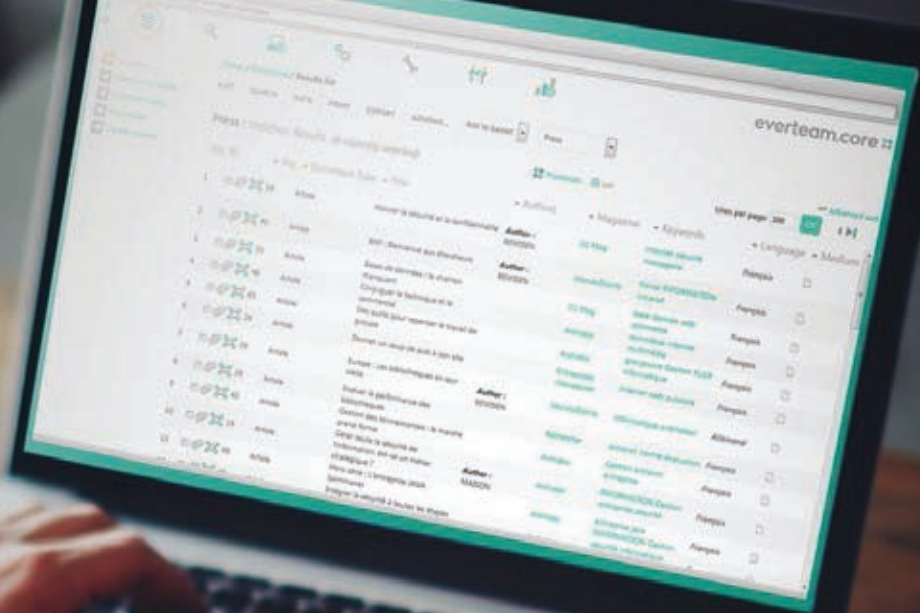
Essential for the business to keep customer happy by offering the best service. Customers are given access to knowledge, troubleshooting tips and other documents chosen by your organization.

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## Higher levels of productivity

Staff using a centralized system to manage and organize files.

# everteam



Sounds like a solution you need? contact us here

<https://www.everteam.com/en/contact/>

## About Everteam

Everteam brings over 25 years of experience and innovation to the field of enterprise content management. In an ever increasing legal and compliance environment, everteam enables enterprises to build and manage content-driven processes that support a range of business opportunities.

### Global Services

[info@everteam-gs.com](mailto:info@everteam-gs.com)

[www.everteam.com](http://www.everteam.com)

[www.everteam.com](http://www.everteam.com)

+961 3 397839 | Mar Mansour Street - Naccache - Lebanon