

## CUSTOMER CASE STUDY



# Lifeline Speeds Critical Services with RightFax Automated Universal Information Exchange

*"RightFax fulfills a critical business need for automatic end-of-event reporting, plus desktop faxing adds several other benefits." Ken Kwa, Manager of Voice and Data Services, Lifeline*

*"After my surgery ... I kept falling down. I was scared and couldn't call anyone. Now I know I can get help when I need it. They call it 'Lifeline,' I call it my 'Life Saver!'" (Judith, Lifeline subscriber since 1977)*

*Judith and thousands of other subscribers rely on personal emergency response from Lifeline Systems. To maintain status as North America's leading supplier of such critical services, Lifeline depends on effective technology solutions. Accordingly, when the company updated its call center platform, it also searched for an automated enterprise fax solution that would support its mission to improve, even save, lives.*

### BACKGROUND

For close to 30 years and affecting more than 5 million subscribers, Lifeline Systems Inc. (Nasdaq: LIFE) fosters independence for elderly patients and peace of mind for their caregivers. Through Lifeline services, seniors have 24/7 access to help: They simply press a personal alarm button to connect to a professional who will assess the situation and link the caller to assistance.

Lifeline ([www.lifelinesys.com](http://www.lifelinesys.com)) services are distributed through more than more than 2,500 healthcare organizations, community agencies and senior living facilities.

Headquartered in Framingham, Mass., with three additional offices in the U.S. and Canada, Lifeline employs more than 750 and operates monitoring facilities that handle 21,000 calls per day.

### THE CHALLENGE

Commitment to excellence is expected at Lifeline, from interaction with customers to efficient technology solutions. Recent awards include the Laureate in the 2003 Computerworld Honors Program, a nomination-based award recognizing companies who use information technology to benefit society.

Handling information for hundreds of thousands of customers requires robust technology solutions—an area in which Lifeline demands excellence. "We work to marry innovative proprietary technology with existing best-of-breed information technologies," Ken Kwa, Manager of Voice and Data Services for Lifeline, related.

In the center is Lifeline's Care System service offering that controls customer data. It depends on technologies from Cisco, Oracle, HP/Compaq, Intel, Microsoft, Xerox and others. When Lifeline needed to add faxing to Care System, it looked for innovative design, flexibility and high reliability.

Faxing is a critical communication method for Lifeline services. When a Lifeline subscriber pushes his/her personal help button, a watch-sized pendant worn around the wrist or as a necklace, a radio frequency signal activates the subscriber's home communicator, which transmits an identifier used by a Lifeline agent in the response center. Upon receiving the alert, the agent determines if there is an emergency and dispatches appropriate help.

Such incidents create "end-of-event" reports that are faxed to program managers, Lifeline's partners in healthcare organizations across the U.S. and Canada. Accessibility and security requirements necessitate reports to be sent to managers via fax: Some hospitals rely on fax exclusively and find it to be an easier method for meeting HIPAA guidelines as compared to encrypted emails.

Faced with a daily volume of close to 7,000 end-of-event report faxes, Kwa outlined the need for a dependable fax system. "Lifeline could have serious repercussions without a reliable solution," he said. "Program managers need quick information to follow-up with subscribers."

While an unofficial service level requires the reports are sent within two hours, the actual expectation is that the documents are distributed nearly instantaneously, according to Kwa. One day without service would delay thousands of reports. "Because of our critical volume, we can't afford to get behind," Kwa said.

While automation was Lifeline's top priority for a new fax system, employees also recognized the need for improved interdepartmental communication. For instance, orders would be faxed and re-faxed by the sales and data entry teams. Although the departments were in the same building, the data entry unit handled as many as 3,000 faxes per day, so 50 feet proved far enough for papers to be misplaced. Lost faxes resulted in lost sales.

To manage its faxing needs, Lifeline looked for a reliable fax solution that offers scalability and useful features at an affordable price.

## THE SOLUTION

As an organization recognized for effectively using technology to benefit society, Lifeline knows a useful solution when it sees one. "We liked Captaris RightFax right away," Kwa said. "It made a lot of sense: RightFax fulfills a critical business need for automatic end-of-event reporting, plus desktop faxing adds several other benefits."

Lifeline installed RightFax in 1997 at the recommendation of inTouch Technology Corp., a Boston-based solutions provider. "inTouch always provides expertise and clever solutions to Lifeline," Kwa said. "We get significant value from our relationship with inTouch."

Growth at Lifeline has been met by scalable RightFax capabilities. Most recently, Lifeline upgraded to RightFax Enterprise Integration, a full-scale, automated e-document delivery solution within the RightFax Universal Information Exchange (UIX) suite of products.

Lifeline found RightFax effectively integrated with its Care System for the automatic faxing of critical end-of-event reports. Kwa explained: "Our Care System subscriber data has built-in triggers so if something happens to a subscriber, a report is generated and sent as a 'print job' to RightFax. Embedded code in the report is also pulled by RightFax automatically extracts the fax recipient and number embedded in the report."

Without an automated, electronic process, end-of-event reports would not be distributed within the required timeframe or cost-effectively. This reality was a deciding factor for Lifeline when it compared fax systems. "RightFax seemed to have more robust capabilities," Kwa said. And, unlike other solutions, RightFax works across a range of technologies and architectures, such as Unix, NT, Windows 2000, Actuate, HTML, Postscript, PDF, email, printer spools, etc.

Since RightFax was initially installed for automatic outbound reporting, efficiencies from sending and receiving faxes at the desktop have been an added bonus in the form of time and productivity savings, HIPAA compliancy and even additional sales.

Approximately 3,000 pages per week are sent to several internal customer service staff members who act as program managers for hospitals. Before RightFax, the team would print reports and a supervisor would collect the papers to hand out. After annotating,

the staff would return to machines and manually fax the documents—a problem recognized by managers who did not like to see several people waiting at fax machines rather than working at their desks.

With RightFax, employees receive documents at their desktop computers through integration with Microsoft Exchange. In fact, for the customer service members handling communications logs and new subscriber reports, RightFax is set to automatically distribute data to the next available agent—a more balanced approach for efficient follow-up with customers. Faxes are delivered directly to users' Inboxes alongside emails and may be managed with similar point-and-click forwarding and storing.

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"Now, we see a lot of benefit with RightFax to electronically send the documents to customer service representatives who annotate and file them for long-term storage and archival—all electronically," Kwa related. "The documents never hit paper."

While electronic storage leads to "nice and neat" filing, Kwa mentioned several helpful results of the streamlined process, including HIPAA compliancy benefits. "The audit trail is important and a huge aspect of HIPAA," he said. "It is easy to use RightFax to see when faxes were sent and to whom."

RightFax has also streamlined efforts to complete sales. "Once we got away from someone grabbing papers off a machine we gained more control over faxes," Kwa said. Electronic faxes never get lost in a pile or dropped on the floor, and various teams—such as sales and data entry—can view faxes simultaneously, resulting in faster response.

Quick service in the sales and installation process is critical. To meet its commitment to offering exceptional customer care, Lifeline works to install services within a few days after it has been ordered. Kwa explained: "Some subscribers are concerned using emergency response services will make them appear less independent. As a result, if our sales team doesn't get a sold system installed quickly, subscribers who would benefit from the system may cancel." In addition to ensuring customers are protected, Lifeline avoids penalties by installing systems within set times.

Using RightFax, Kwa said the Denver office implemented a 24-hour turnaround to install service for customers, resulting in tremendous success and growth.

Speaking of timing, Lifeline is glad to receive 24/7 reliability and room to grow with RightFax. The latest RightFax inTouch-architected design provided needed dependability, according to Kwa. "Other solutions would have doubled the cost for redundancy and scalability," he said. "RightFax allows us to split board server components from the main server to create redundancy and fault-tolerance." Lifeline uses two RightFax Enterprise Integration servers on standard Dell Poweredge Servers split between its redundant facilities in Framingham, Mass.

*RightFax enables 24-hour turnaround installation service, leading to tremendous success and growth.*

## THE RESULTS

In review, Kwa said Lifeline has not tracked specific return on investment statistics, however he has noticed various project-related benefits. "Certainly it's fulfilling a critical business need, then, there are benefits such as the reduction of machines and wasted time using hard copy faxing technology, the simplification of fax distribution, the improvement in clarity of inbound faxes for our data entry team, the handy audit trail and long-term retention of files ... even less filing cabinets for storing paper!" Kwa laughed.

Future plans using RightFax and integrated technologies include advancing paperless initiatives, adding Captaris FaxFiler (an add-on archival utility for RightFax), and using ACXION, (an inTouch workflow add-in for RightFax).

## FOR MORE INFORMATION

Captaris is a leading provider of business information delivery solutions that integrate, process and automate the flow of messages, data and documents. Captaris produces a suite of proven products and services, in partnership with leading enterprise technology companies, delivered through a global distribution network. Captaris has installed over 80,000 systems in 44 countries, with 93 of the Fortune 100 using the company's award-winning products and services to reduce costs and increase the performance of critical business information investments. For more information please contact [www.captaris.com](http://www.captaris.com) or 1.520.320.7000.

## About inTouch

inTouch Technology Corporation helps companies achieve higher returns with software automation that leverages existing information infrastructure. With inTouch, companies merge email, fax and paper-based processes into a streamlined managed work process delivered via Web Services. For close to a decade, a loyal multi-national customer base has enjoyed inTouch's commitment to quality, service, customer satisfaction, and strong leadership from M.I.T. graduate Ira Hochman. For more information about this Boston-based company, contact: [www.intouchcorp.com](http://www.intouchcorp.com) or 617.475.1500.