



How to Choose the Right Document Management System for Case Management

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There is a time in every business where processes need to be changed, improved, or modified in order for your business to grow — processes such as the way you handle your documentation for case management. Whether it's legal services, health care, social services, non-profit organizations or HR teams, when there is a need for case management there is a need for many documents to be associated

with those cases. You may already have case management software in place, however most case management software doesn't include a document management feature. By adding a document management system to your case management process, you can streamline your documentation and allow for more time given back to the team, as well as reducing human errors within your processes.

When it comes to case management, there are various private documents such as personal client information, service plans, evaluations, assessments, and more that are all part of the process to meet your customers comprehensive needs. All these documents need to be stored and retrieved when necessary, but they can only be stored in filing cabinets for so long until they become too overwhelming to manage. Documents can get lost, misplaced, and are extremely hard to search for when you don't have the proper document management system. If you can't easily retrieve a document — can you really consider it stored and managed?

We understand that the process of implementing a document management system can feel daunting, but having a solution that will capture, store, search, and easily access your documents securely is a necessity to any growing business.

Let's Get Started

The first thing you might ask — where do I start? That's where we come in to help. When it comes to implementing a document management system you want a vendor whom you can trust and will support you from beginning to end. Through this blog you'll learn what points you must consider when beginning the process of choosing not only the right document management system for your case management, but also the right vendor.

What Functions/Features do I need?

The best place to start when looking for the right document management system is to define what features you need for your case management. Doing this in the beginning can help you understand exactly what you need from a document management system and save you from a lot of headache later in the process.

You first want to look at what documentation processes you are already using for your case management. You may have a procedure for your legal documentation that already goes through certain processes within your case management team. Look through these existing processes and pinpoint what features or automations you will need from your document management software in order to maintain and optimize your current processes.

By iterating the process above throughout all the departments that have a hand in case management, you'll develop a solid plan on picking which vendor and system will be right for you. With the features and capabilities you need in mind, you can feel confident that you'll have what you need to make the right document management vendor decision.

Can it Capture *All* My Documents?

Another main part of a document management system is making sure that all your documents can be imported and exported. Whether it's a word document or a PDF, you want to ensure that all your documents can be captured and tracked the moment your business encounters it. A well-designed document management system will also allow you to store electronic artifacts including audio, video, and creative file formats.

Not only do you want a document management system that will capture and store all documents, it's critical that they're also easily

accessible. This is accomplished by [indexing your files](#) and most document management systems have different methods of indexing, such as keyword tagging, database records, and text search. This allows your case management team to not only have all documents scanned and stored, but also easily searchable and retrieved at a moments notice.

What Process Features are Offered?

Now that you have an idea of what you will need from your document management system, you can begin looking for vendors that have all the features and capabilities your case management team needs. For example, say you have a new case and you want the client information document sent to a specific member of your team. You could just email or send over a link, but as more and more cases come up, this is a process that could easily be automated with a document management system to save you precious time in the long run. With automations, you can assign the document to the person taking over that case and send documents to the right people at the right time. These key features such as workflow solutions or delegation would be something to look into as your case load increases.

Different document management systems have different features. When searching and negotiating for the right one, be sure that your vendor understands what your documentation process is so they will help you find what solutions best fit your needs. With Optix, we have [many different features and solutions](#) such as workflow automation, indexing, integration, scanning, and more that can streamline your case management documentation.

On-Premise, Cloud-based or Hosted?

An important part of moving toward implementing a document management system is where your documents will be stored. For

example, if you are a legal company doing case management you may have legal obligations that forbid you from storing data in the cloud to protect customer privacy. Depending on what industry you are in and how secure your documents need to be, you would want to talk to your vendor about where your documents are going to be stored and which option is best for your business.

Will it Integrate with my Current System?

This question is key when finding the perfect document management system. You need a document management solution that can work with the system you are already using. For case management, you may already have a system in place specifically for the case management department. You want to make sure that the new document management system is able to integrate seamlessly with the current system in order to make it as simple as possible for you and your team.

What Next?

Time to start the search! Now that you have a better understanding of exactly what to look for in a document management system for case management, it's time to start researching different vendors. You may want to look into vendors that have worked with case management before so you know they have a deep understanding of your needs. Be sure to also ask about support and training once the system is in place. You want a vendor that will help you from start to finish to get you the solutions you need. Once your new document management system for case management is in place, you can start reaping the benefits almost immediately. *Want to throw some questions our way? [Contact us](#) to learn more about Optix, a document management and workflow solution that will improve your day-to-day processes and give you the tools to perform at your best.*

