



Aspose.Words For .NET



The Karis Group

SalesForce document Management

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Product Background / Overview

The Karis group provides patient advocacy services to individuals who have exhausted their medical benefits and are now receiving care on a self pay basis. Our team mediates directly between patients and providers, allowing patients to focus on their health while we focus on solutions for their bills.

Our negotiations generate large numbers of documents and to streamline our processes we built a custom Salesforce.com solution that generates custom merge templates from our data and sends those documents out via a number of routes including faxing and e-signature.

Requirements Scenario

In the original incarnation of the solution, A server side copy of Microsoft Word was scripted through COM automation to open a file, merge data in and then either print or save the document. As COM automation is not thread safe, if multiple team members opened the application at the same time, Word would freeze and the web application would be in an unrecoverable state until a full server reboot.

Our requirements for the new solution were:

- All code server side and multi-user safe
- Use native Word document formats
- Replicate Mail Merge functionality
- Ability to print to a network printer

We also had a couple nice to have requirements including:

- Output to PDF
- Ability to insert items into the document dynamically

Solution Implementation

Before we found Aspose, we spent a fair amount of time struggling with RTF documents as a possible alternative to using Word documents. After that effort became bogged down, we took another look at Aspose and took advantage of the free trial. Within hours we had the library integrated and documents being produced and printed without issue.

When integrating Aspose, we made extensive use of the mail merge features as well as the print system. The online documentation made the entire process very simple and our code ended up substantially easier to maintain and understand compared to the COM automation solution we had in place before.

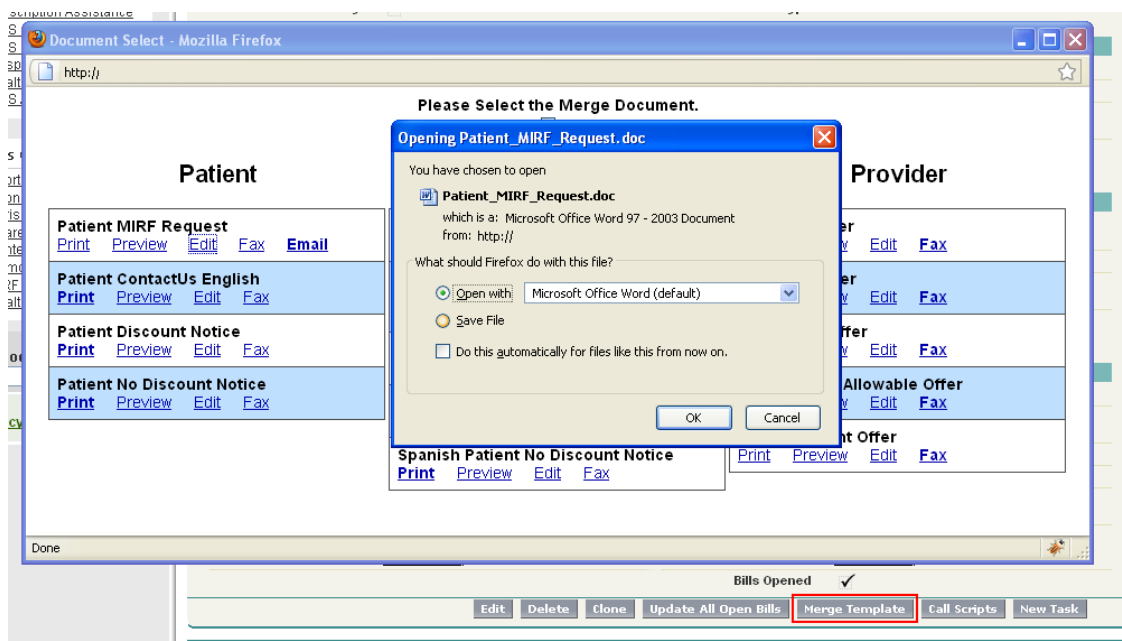
Benefits

The old system was less stable, but since integrating Aspose.Words we have not had any downtime and our documents look the same as they did when we had Microsoft Word rendering our documents. Our system is more maintainable than it was before and we're not concerned about our ability to handle new documents as they're created.

Conclusion

If we had not found Aspose, our solution could not have become as robust and easy to maintain as it is now. We were hesitant at first because of the price, but we have already more than made up for it with increased productivity on the development side and decreased downtime for our workers. Any developers who have to programmatically work with Word documents and are considering an approach through scripting Microsoft Word owe it to themselves to try the Aspose library first.

Screenshots



The user can select to merge a template from a bill and then chooses from a number of pre-built documents and can choose to immediately send that to a printer, view it in HTML, download it for local editing, fax it via RightFax or email it via EchoSign.

Patient_MIRF_Request-1.doc (Read-Only) [Compatibility Mode] - Microsoft Word

the karis group
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3/2/2010

Medical Information Release Authorization

Patient's Name	Test Coverdell		
Address	123 Main Street	City	Austin
State	Texas	Zip	78701
SSN	111-22-3333	DOB	3/2/36

The undersigned ("you") hereby authorizes any medical practitioner, hospital, facility, insurance company or any other person or entity that has your medical records or knowledge of your medical records and/or the dependents listed herein, to release such information upon request to The Karis Group for the purpose of The Karis Group negotiating medical bills on the undersigned's or dependent's behalf.

The undersigned ("you") hereby grants permission to The Karis Group to discuss any and all medical bill related information with any medical practitioner, hospital, facility, insurance company or any other agency that has your medical records or knowledge of your medical records and/or the dependents listed herein for the purpose of The Karis Group negotiating medical bills on the undersigned's or dependent's behalf.

The undersigned ("you") understands that:

- You may revoke this medical information release at any time, in writing, but the release shall remain valid until revoked or upon the expiration of one (1) year after the release is executed, whichever occurs first.
- This release may include medical records of treatment for physical and/or emotional illness, except psychotherapy notes, including treatment of alcohol or drug abuse.
- The Karis Group will maintain the privacy of any information obtained and will not disclose such information to any other person or entity except as necessary to effectuate service or by express written permission by me.
- A copy of this form, including a facsimile or scan, may be used in place of the original.

I acknowledge that I have read and understand this Medical Information Release Authorization. Further, I authorize the disclosure of my or my dependent's protected health information in accordance with the terms in this Authorization.

Signature of Patient
(or Parent/Legal Guardian if Patient is a minor)

Date Signed

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The completed document has all the relevant data from our Salesforce.com database in it and is ready for immediate release to a provider or patient.