

ACTION PLAN

Practice improvement strategies

Improve work flow, patient care with document management systems

By Rivka Tadjer, journalist and author, rtadjer@mrb-pr.com

ChoiceCare Physicians, a busy eight-doctor private physicians group in Pittsburgh, had work-flow problems that were getting worse every week. While diagnostic reports were in constant demand, staffers had difficulty tracking their progress. They didn't know whether they had received the reports or, if they had, where they were or if the doctor had seen them. And if a patient called for results, it took a long time to find the report.

"There were constant questions no one had answers to," says Tara Stawiarski, practice administrator for ChoiceCare Physicians. "You can't run a doctor's office that way. You can't offer patients efficient and responsible service that way."

Watch out for common traps

One way to keep important documents from falling through the cracks is to create a paperless office using a document management work-flow solution. While there are several options to consider, the trick is to know what questions to ask and how to weigh your options and identify the best solutions. With document management software, there are certain features users can expect with most programs, such as security settings, friendly user interfaces and fast file retrieval.

Stawiarski found a document management program for ChoiceCare Physicians after attempting to customize the existing system, which was unable to lasso work-flow problems or integrate accounting programs and other business processes.

"At one point we tried to use an electronic health record, but the system forced us to adapt to its business procedures, which never worked," Stawiarski says. "It cost us time, which means money. We ultimately abandoned the system because it couldn't

handle an influx of new data, particularly from disparate sources."

ChoiceCare Physicians opted to use a document management and work-flow company to write a program that allowed staff to import those documents to an electronic filing system.

What to look for in document management solutions

In addition to integrating existing business procedures, document management systems can scale and allow purchase of concurrent and/or dedicated user licenses to meet the needs and budgets of small and large clinics.

Here are some features you can expect from document management systems:

- A user-friendly interface to optimize usability;
- Effective document organization that mimics paper document filing procedures;
- Security features that control access and user rights on documents;
- Multitask features to access and use several patient charts simultaneously;
- Work-flow management that allows patient intake information to be sent immediately to nurses, who collect insurance information and forward it to the billing department;
- A forms engine that replaces paper forms. Some vendors charge extra for this feature, but it can be included in the base price, which ranges from \$50 to \$500 depending on complexity;
- Ability to name and classify documents with templates. Classification should clearly define who has authority to access

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documents and set a retention policy. Retention is determined by federal regulations, which require professionals to keep documents for a specific time. Templates help reduce errors and increase productivity;

- Less storage space and cost of storage (file cabinets and paper archives); and
- Generous service plans. No matter how easy a program is to use, there is always a learning curve, which requires customer support.

Medical industry specifics

When it comes to creating electronic patient chart forms, software packages can make things easier.

“The system automatically makes a

folder every time we get a new patient,” Stawiarski says. “We have Excel, Word, images and PDFs – all kinds of inherent capabilities with our document management system.”

She can also run reports from the system.

“If there’s a recall, and I need to know how many people are on certain medications, or how many people are getting physical therapy, I use keywords or full text searches to identify the patients who are affected,” she says.

One industry-specific service is the notification of duplicate files. If a clinic has two patients named John Smith, high-quality systems have an index for cross-referencing with a second value, such as date of birth, Social Security number or other unique identifiers. The system should automatically display a

second value or search field to determine if it is the correct patient. These types of issues can pose HIPAA privacy concerns because the law requires groups to keep each patient’s personal data confidential.

As you weigh your options, remember that new technologies are constantly emerging.

For example, Stawiarski says she is interested in digital signatures that synch with prescription writing so doctors can sign reports electronically. 🏥



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