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American Behavioral: A Case Study on the Benefits of Document Management Software

American Behavioral, a full-service behavioral health care organization providing employee assistance program (EAP) services and managed behavioral health care, knows intimately the struggles associated with processing claims in a paper-based system. Up until recently, the company's claims department was overwhelmed by the task of processing claims; since switching to document management software, however, things have looked a little different.

With an eye on improving its business processes and efficiencies, American Behavioral transitioned to a document management program approximately 22 months ago. Since that time, the company has experienced firsthand the benefits of switching to a virtual storage of data, including more efficient claims processing, improved customer service, and easier access of records at the desktop for all departments.

"The need for imaging arose from the fact that we were overwhelmed with paper in our claim department," explains Vickie Wood, senior claims examiner at American Behavioral. "We filed our paper claims and copies of claim payment check and explanation of benefits (EOBs) in a large file

room. There were several inefficiencies associated from opening the mail and distributing the paper claims to claim examiners all the way through the claim processing and mail out of claim payments. Each examiner also received faxed claims. Claims were being lost or misplaced. Staff members were overwhelmed with paper on their desks and the inability to find claims, documents, and/or copies of EOBs. This became more and more of a problem for telephone customer service; our examiners also answer all claim calls, so their daily workload was becoming overwhelming."

With the implementation of CNG document management software (i.e., CNG-SAFE, CNG-Batch, Workflow, Retriever, and Synchronizer), American Behavioral began imaging its mail as soon as it was opened and sorted. "Documents are less likely to be lost or misplaced when they are imaged as soon as they are received," stresses Wood, "so we began a front-end imaging process."

CNG's Workflow program replaced enormous stacks of paper with a "virtual inbox" for each examiner, which allowed them to manipulate and manage their claims assignments more effectively. American

Behavioral also incorporated the use of a second monitor, which allowed for the image of a claim on one monitor and the image of the claim system on the second monitor.

“This makes it easy to enter the claims information into the claims system,” says Wood, “and eliminates the need for paper copies. With the use of Workflow, claim images can also be routed to another examiner’s or the supervisor’s Workflow for approval or questions. Claims can also be routed to our managed care department for questions and review,” she explains.

American Behavioral also uses CNG’s Retriever and Synchronizer plug-ins, which interface with the company’s claim system. Synchronizer identifies new memberships in its claim system and creates a folder in CNGSAFE to match the new membership eligibility. Retriever allows the user to access files in CNGSAFE without leaving the claim screen. This has become a very useful customer service tool, says Wood. “It’s like a small CNG-SAFE that you can access from the claims screen. We can look at all the claims that have been received, processed, or not processed for a member while in the claims screen. This is very helpful when answering claims status telephone calls.”

In terms of improving business processes — and by default, improving the quality of care and cost of care provided to patients — the implementation of document management software has helped American Behavioral reduce the number of lost documents, improve claims turnaround service and

telephone customer service, and reduce the stress of employees overwhelmed by stacks of paper on their desks, says Wood. It has also helped alleviate the “time” and “cost” burdens felt by those working in the claims department. Information is now centrally located on the computer and does not require excessive amounts of time to store or retrieve. Since it is filed electronically, the company has also saved money as a result of no longer needing filing cabinets, file space, binders, paper, printer ink, paper clips, and a host of other office supplies.

“We will ultimately see a cost savings on real estate as well by not having offsite storage space since we will now have less to store,” notes Wood.

To maximize the benefits of an automated system, there are a few things companies need to remember, stresses Wood. First, it is important to have a good understanding of the document flow. Also, do not be afraid to not use paper, and make sure there is a dedicated employee to scan documents and work in the document management software. If possible, watch demonstrations of the product to see how easy (or hard) it is to use, and maintain open lines of communications with employees about the product(s) they will be using.

“As a result of implementing the CNG-SAFE document management system, American Behavioral staff members, including me, are in a much better position to handle the new demands being placed throughout the medical industry,” adds Wood.