Community Reach Center Reduces Costs, Secures Client Files & Improves Information Access for Client Care with Electronic Document Management

The Community Reach Center of Adams County (CRC) is busy community mental health center committed to understanding and improving the mental and emotional health of the people they serve. Prior to incorporating a paperless document management system, CRC was continuously moving hardcopy medical charts, often several hundred throughout the organization (six locations in all), and keeping track of where charts were within the company. This proved to be a time-consuming, staff-intensive and costly task. Each time a chart was moved the risk of losing or misfiling it increased. They were concerned about spending more time focusing on their clients' needs and well-being and less time searching for medical records.

Scanning medical charts and managing client information electronically has allowed the Community Reach Center to:

- ✓ *Centralize Records from six locations to one*
- ✓ *Save 60 hours per month in time spent retrieving documents*
- ✓ *Eliminate $13,000 in annual offsite document storage costs*

In May 2005, CRC decided to implement an on-premise electronic document management system, integrating PaperFlow, high-volume document capture software, and PaperVision Enterprise, an easy-to-use, on-premise document management software. The installation allowed CRC employees to scan entire medical charts including progress notes, diagnosis, prescriptions, lab results, dictation etc. for viewing with PVE. CRC was able to increase efficiency within the organization and provide instant access to critical medical information to anyone who needed it.

The Situation

Founded as a private, non-profit treatment center in 1957, the Community Reach Center is one of the premier providers of counseling and mental health services for adults, adolescents, children, families and seniors in the Denver, Metro area. CRC generates $19 million in revenue annually and employs 275 employees.

CRC's Clinical Services department uses paper most frequently for medical charts, which were housed in six different locations. Clinicians, physicians and therapists would request a medical chart through the Records Department, and the department would locate the chart and arrange for delivery.

At the site, staff would box the chart(s) and complete an internal certified mail slip, which would be signed by the recipient. The Transportation Department, whose primary responsibility was to transport clients, would\pick up the documents and deliver them to the appropriate location. There are four vans used to transport clients as well as the medical charts, so the drivers served a dual purpose.

Several medical charts were boxed up together, often weighing as much as 25 to 40 lbs. The main concern of the driver was to get clients where they needed to be, so adding the transportation of medical charts was an additional burden.

The turnaround time, depending upon the time of the request and the ability to locate the documents, could be anywhere from 3 hours to 2-3 days. After use, medical charts would be returned to the original location using the same process. Last minute requests required staff members to drive to pick up the chart while urgent requests would require employees to drop their current activity, locate, pull and fax the chart within one hour. With approximately 200 requests for charts per week, in addition to the charts already in circulation, several hundred charts could be in circulation in a given week increasing the risk of lost or misplaced charts.

The Solution

After evaluating different document management systems, CRC chose Digitech Systems PaperFlow and PaperVision Enterprise software. They installed PaperFlow, high-volume scanning software that included barcode recognition and optical character recognition (OCR), on two workstations at the center. In addition, 25 concurrent PaperVision Enterprise licenses were configured to give employees (with appropriate permissions) easy access to retrieving medical charts and other client information. (Approximately 175 employees have access to the system and view records on a daily basis.)

It took less than a week for software installation and integration with CRC's existing electronic medical records (EMR) system, IRIS. Through simple programming the document management product was integrated with IRIS, providing instant access to external records for Clinicians and staff. Training was minimal (2-3 days) since the documents were integrated directly with their current system. In the first six months, CRC scanned and integrated approximately 430,000 images.

Recognized Benefits

The most impactful benefit for CRC was being able to eliminate the process of physically transporting medical charts. The Transportation Department can focus on transporting clients instead of boxes of medical charts. By eliminating the physical transportation of medical charts, CRC reduced the risk of lost or misplaced charts and saved approximately 60 worker productivity hours per month. This improved employee morale and productivity.

> *"The system works great! Any time you can set it and forget it, it's a beautiful thing!"*
>
> *Greg Stanton, IT Director, Community Reach Center*

CRC eliminated $13,000 in recurring annual offsite document storage costs. The Center also consolidated its Records Department from six locations to one, allowing CRC to reclaim and repurpose office space.

Most importantly, clinicians, physicians and therapists now have instant access to the documents they need right to assist clients and answer questions right from their desktop PCs. While working in IRIS, staff can click a button to pull up and view a list of documents associated with a client's medical chart (e.g., treatment notes, prescriptions, etc.) In addition, RNs can view handwritten prescriptions from their treatment location instead of requesting a faxed copy.

The system provides CRC another tool to meet provisions of the Health Insurance Portability and Accountability Act (HIPAA). By scanning the external records into PVE, Community Reach Center takes advantage of automatic usage and disclosure tracking and also protects privacy through security settings and the redaction feature. Redaction lets users or administrators block off confidential information (see image above), allowing them to distribute records for reporting and auditing without compromising patient privacy.

However, benefits were not just limited to the ability to immediately view medical charts. The Accounts Receivable staff can print financial agreement signatures without ever leaving their desk or sending a request to the Records Department. They can also capture and archive client benefit records and other financial data the center is required to keep on file.

About D2Xchange, LLC

D2Xchange is a Digitech reseller and a full-service provider of data and document management solutions to capture, manage, retrieve and distribute information more effectively and securely. With more than 15 years of document scanning and content management systems experience, D2Xchange is uniquely qualified to assist behavioral health organizations and other healthcare providers. By providing paperless office solutions with options to integrate with EMR and other line of business applications, D2Xchange helps organizations to access information faster and more securely in order to streamline paper-laden work processes and improve customer care and service. To learn more, visit www.d2xchange.com or call 866.329.8599