



FMRS Integrates Document Management & EMR to Streamline Workflow, Improve Information Access and Secure Confidential Client Data

[FMRS Health Systems, Inc.](#) (FMRS) is a busy mental health center serving the citizens of Raleigh, Fayette, Summers and Monroe Counties in Southeast West Virginia. First organized in April 1969, FMRS provides an array of comprehensive services focused on the diagnosis and treatment of emotional and behavioral health problems. FMRS operates four county offices and five treatment houses. The agency employs roughly 150 mental health professionals including psychiatrists, physician assistants, nurses, licensed psychologists, therapists, counselors, social workers, service coordinators, and paraprofessionals.

In the course of treating approximately 5,000 clients each year in their network of 9 facilities, FMRS generates incredible volumes of paper files and patient records. In 1988, FMRS adopted a CMHC electronic medical records (EMR) system. While this system instantly reduced the volume of hardcopy documents FMRS was creating, it could not replace paper documents all together. Regulations still required FMRS to collect original or “wet” signatures on specific forms such as progress notes, patient releases forms and more. FMRS continued to manage these forms in hardcopy format creating challenges such as:

- Assuring files were available 24/7 to clinicians, QA staff and others
- Sharing information between clinicians and across locations
- Transporting physical files between FMRS facilities and managing the inherent risk that files could be lost or breached
- Securing the confidential information each file contained

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Deb Coulter, Chief Information Officer

When a fire destroyed the medical records room in 2003, FMRS had to rebuild its medical records systems. The organization seized the opportunity to create a less paper-intensive system that would enhance information access and sharing while strengthening confidentiality and future disaster recovery.

Scanning – The First Step in the Process

FMRS started with scanning patient files and centralizing scanning operations in the medical records department. Using [PaperFlow](#), a full-featured scanning and indexing software, FMRS was able to image high volumes of documents quickly and efficiently.

To automate the step of indexing files, FMRS created a customized barcode program that allowed the medical records staff to enter a client ID number prior to scanning a client form.

“The program we created pulls data directly from the CMHC EMR system to create a customized barcode for each client file we are scanning,” says Deb Coulter, Chief Information Officer. “The barcode includes key data such as the client’s name, ID number, date of birth and staff member providing treatment.”

PaperFlow reads the barcodes as documents are scanned. Key index fields are captured from the barcodes and auto-populated in seconds. The automation minimizes manual data entry and assures greater accuracy in completing the important step of indexing FMRS’s electronic files.

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Creating an Accessible, Centralized Repository

The second step in moving toward a less paper-intensive client records system was to create a centralized, electronic repository for the scanned FMRS documents. For this, FMRS chose [PaperVision Enterprise](#) (PVE), a robust, on-premise document management software system that provides FMRS tools such as:

- Centralized storage for scanned documents as well as electronic files in more than 250 native formats
- Automated document upload
- Integration with Microsoft Office
- Multiple layers of system and document security
- Audit trails for system and document access
- Automated records management

FMRS added further value to their PVE document management system by customizing it to allow clinicians and other staff to select e-forms from the FMRS network. Staff members complete the forms at their workstations following built-in prompts designed to assure consistent collection of information. Using a signature pad (similar to pads commonly seen in retail stores) the staff signs the forms digitally. As soon as the form is closed, PVE automatically uploads and indexes the document, using data pulled from an FMRS Access database.

“We’ve not only reduced the volume of paper we have to manage,” says Coulter, “we’ve streamlined the entire process.”

Monitoring System and Document Access

Managing more information in an electronic environment has also enhanced data security and regulatory compliance at FMRS. In this regard, FMRS has found the system and document access reports and individual document audit trails PVE generates of particular value.

“In the past, our compliance officer had to make multiple trips to the medical records room to pull consumer charts. There was always a risk that a file might be in one of the clinics or that documents were missing from the file. This is a much more efficient process,”

Deb Coulter, Chief Information Officer

“Every day we can look at who has accessed our PVE system and which client records they have viewed,” says CIO Deb Coulter. “This helps us in instances where a consumer might be a friend or acquaintance of one of our staff members. Our consumer will tell us that they don’t want that individual to see their records. In addition to using document-level security features in the software to limit which staff can see which records, we can verify specific client records have not been accessed by reviewing PVE’s system access reports.”

As part of their West Virginia state licensing requirements, FMRS must document that progress notes have been written for every consumer visit. Their paperless system allows the QA department to easily compare progress notes being entered into PVE against the schedule of clients being seen each day.

The system has also made it easier for the compliance officer at FMRS to monitor staff activity. The officer conducts a document search based on a client ID number and automatically sees which staff has been involved in the consumer’s treatment. The same is true in reverse. By searching on a specific staff ID, it is very easy to see how many services have been performed by that person in a specific timeframe. This is particularly helpful for monitoring new staff as they are being trained.

“In the past, such monitoring activity required multiple trips to the medical records room to pull consumer charts. There was always a risk that a file might be in one of the clinics or that documents were missing from the file. This is a much more efficient process,” Coulter says.

Moving forward, FMRS plans to extend the convenience and efficiency of their electronic document management to their back office human resources and accounting functions.

About D2Xchange

D2Xchange is a Digitech Systems 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.

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