The competitive landscape in healthcare is driving innovative approaches to managing both patient care and longstanding business processes. Tasked with reducing costs, increasing efficiencies and delivering a higher quality of care, leading-edge healthcare organizations are leaving no stone unturned in their effort to streamline and glean value from what once were considered routine operations.

A good example is Altus, Oklahoma-based Jackson County Memorial Hospital (JCMH), which has been at the forefront of paperless processes for almost a decade. Beginning with patient registration, this 99-bed, rural hospital with five clinics serving five counties has expanded its paperless approach to include a number of business departments, as well as its digital picture import process.
While doing so offered significant operational improvements, many challenges remained. Paper processes still existed throughout the hospital departments, and their electronic files lacked organization.

Although successful in freeing up space in its medical records department – a small but critical victory in its own right – IT Director Dena Daniel knew the hospital could do more to improve workflow, so in 2010 a team began reviewing alternate solutions. JCMH wanted a seamless scanning and archiving solution that would consolidate and streamline various types of content across the enterprise, regardless of the original format, including paper, faxes, photos, videos, emails, contracts and more – something that would enable instant access to the critical information clinicians and staff need most. In September 2011, JCMH converted to the enterprise content management (ECM) solution OnBase® by Hyland Software, beginning a process that ultimately would consolidate operations and boost efficiencies enterprise-wide, from admissions, to HR, to HIM.

Although JCMH wanted to get started right away, the project was delayed because the hospital required new hardware for its server room, and IT was debating the merits of going cloud-based versus other components they might choose to implement. In November 2012, having settled on a solution for its storage needs, Daniel and her team began configuring JCMH’s hardware to implement OnBase. At the time, Daniel’s job was complicated by the fact that she was wearing two hats – IT director and director of revenue cycle – but by November of the following year, JCMH began its conversion process.

**Leveraging IT to provide the complete patient picture**

The first step entailed taking all of the previously scanned and archived documents from JCMH’s Valco EHR and moving them into the OnBase solution. All users had to be retrained, but by February 2014 the organization was all-in, having subsequently purchased the OnBase Release of Information and Electronic Signature Pad modules. The hospital also committed to scheduling additional annual purchases, so it could maintain its fully integrated EHR and archiving solution.

“We have a Meditech Magic health information system, so we set up the purge and archiving from different applications within our HIS,” Daniel said. “We archive spool files, any nursing documentation that’s put into the system electronically, all lab results and reports, medication information and our billing records.” These documents can be retrieved in a couple different ways; for the most part, they are pulled back through their respective modules. In JCMH’s case, documents are retrieved through a patient care inquiry (PCI) module, which resembles a full-blown medical record. Both Meditech and Hyland offer guides and support to assist users with set-up, data monitoring, document retrieval and other tasks.

During the transition process, Daniel and her team discovered that patient-care documentation archived through their Meditech HIS was only viewable through the Meditech application; to view it in OnBase, they purchased the OnBase Reporting application, which the hospital is now in the process of implementing. Another discovery was fixing incorrect documentation on the account within the module in which it was stored.
produced. For example, if lab results were entered for the wrong patient, JCMH staff would correct it by moving the information to the correct patient within their Meditech HIS. Once the information was flowing correctly, it would be re-indexed in the archiving solution.

**Beyond the EMR: ECM provides instant access to patient information**

Of all the scanning and archiving projects the hospital undertook, implementing digital picture import was perhaps the most impactful. When they began the process, JCMH was relying on a hodgepodge of Polaroid cameras being used.

Today, every department responsible for taking pictures – Emergency Department, Wound Care Nurse, Rehab Services for Wound Care, Women’s Center - Newborns and the Operating Room – is outfitted with digital cameras. Staff members take the pictures, making sure to include patient and other identifiers and upload the images to a file share. Following a process called the “Sweep Process,” a utility lets users document, index and commit the images to archiving.

Other areas of the hospital set up with scanning include: Admissions/Scheduling, for registration documents; Health Information Management, for medical records; Case Management, for utilization review documents; Human Resources, for employee records; Information Technology, for computer access forms; and the Employee Clinic, which is in the process of getting set up to scan employee health records.

When it comes to managing forms, a number of variables must be considered. Daniel recommends creating a committee to handle the naming of forms mnemonics and dictionary mnemonics. “One of the things we did right was using the paper medical record chart as a guide when setting up our patient care inquiry (PCI) module, or the area where people go in to retrieve records,” said Daniel. “Clinicians were accustomed to using the paper medical chart, so we set up our electronic medical chart in the same way.”

IT also worked with the Purchasing Department to phase out all pre-printed or copied forms and any colored or oversized forms. They eliminated forms that couldn’t be scanned, and they purchased scanned, illegible copy and electronically signed stamps to aide with workflow. All forms were standardized to 8.5 inches x 11 inches, with a .375-inch margin on all sides to allow for punch holes and barcodes. Daniel recommends making sure all forms have a form name, and that any mnemonics are between three and 10 characters. Form mnemonics should be specific, avoiding common abbreviations that could be used for multiple purposes, such as PT or ED.

In addition, downtime forms require the same form ID as the electronic documentation form ID in order for them to appear in the same location within the PCI. Ideally, form names should be barcoded, and the placement of the barcode should be standardized whenever possible, making sure to leave room for a patient label on any form that will be used in patient care.

Once the replacement forms were up and running, Daniel and her team expedited the transition. “We went to our patient-care areas and started confiscating our old forms,”
Daniel said, “That’s how we encouraged people to go on the intranet to get the correct, most up-to-date forms.”

**Driving improvements in patient care and service while reducing operational costs**

For JCMH, making the leap from EMR to ECM was instrumental in streamlining documentation across the enterprise, enabling instant access to the critical information clinicians and staff needed most. Since its implementation of OnBase for scanning and archiving, the IT Department has relied heavily on a forms spreadsheet that lets them know when forms were approved by the forms committee, any given form’s status, how a form needs to be set up and all the different information that must be plugged in. Functioning as a master forms list, this go-to spreadsheet includes the form mnemonic in JCMH's forms program (as well as in Meditech Magic and Hyland OnBase), and the category in which the form may be found.

While the spreadsheet ensures consistency among those managing the forms, the forms setup workflow drives the creation and adoption of new forms that help improve patient care and lower costs. This simple but critical step begins when the form, or electronic documentation, is reviewed by the forms committee and any related clinical committees. Once approved, it is added to the spreadsheet for tracking purposes, as well as the forms workflow program, or hospital intranet. It is then set up in JCMH's Meditech HIS using the MIS Medical Record Forms application. Finally, the form is set up in OnBase.

JCMH does not allow users to print from any document that is scanned or archived unless they present a special reason that is approved by the HIS Security Council. In cases where permission is granted, users may be allowed access to print only the documents they need to print. Printing may be done through the Meditech PCI module, Meditech Chart Subsets or the Hyland OnBase Unity client, which offers the ability to print only certain documents.

Ultimately, implementing an ECM solution has enabled JCMH to free up an entire suite of offices, reduce the amount of money the hospital spends on paper and generate significant time savings as they’ve traded manual filing processes for scanning. “For others looking to embark on this process, I would say the key to success is always to be thinking five years down the road,” Daniel advised. “Ask yourself how people are going to retrieve a given document. How are they going to understand the process for pulling up that document, or where to find it?” Doing so will yield meaningful insights the availability of information across the enterprise, which will ensure a higher level of patient care.

**About OnBase by Hyland**

OnBase is a flexible and comprehensive enterprise content management (ECM) solution that helps organizations manage documents and data to streamline business operations. Integrating with everyday business applications, OnBase provides instant access to critical information when you need it, wherever you are. OnBase grows with organizations as needs change and business evolves.

Every day, more than 1,600 healthcare organizations use OnBase to complete patient records, eliminate reimbursement delays and enhance business processes. For more information about OnBase's ECM solutions for healthcare, please visit [OnBase.com/Healthcare](http://OnBase.com/Healthcare).