



User's Group Forum Panel

CENTRICITY EMR: SCANNING

Panel Members:

Heather Doherty, MSO Support Services
Jane Arquette, Community Health Access Network
Sally Michel, Dartmouth-Hitchcock Concord



Panel Members:

GE CUSTOMERS:

- Community Health Access Network (CHAN)
 - Multi-site enterprise (serving 45,000)
 - 5 Health Centers w/8 primary care sites
 - Health Centers are Family Practice & OB/GYN
- Dartmouth-Hitchcock Concord
 - Large multi-specialty site (serving 41,000)
 - Peds, FP, IM, Allergy, Derm, Ob/Gyn, Ortho, Surgery
 - 32 physicians; 20 assoc; 260 support staff

GE RESELLER:

- MSO Support Services
 - Selling & implementing Centricity PM/EMR
 - Customers of any specialty and varying size in NY and NJ



Session Objectives:

Review:

- Scanning solutions
- Technical configurations
- Scanning infrastructure
- Scanning process
- Common workflows
- Lessons learned
- Key considerations



Scanning Solutions

Supporting small-large clients:

- Kryptiq – DocuTrak
 - Magician
 - SRS
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- Other larger imaging solutions available at higher cost



Technical Configuration

CHAN – Logician 5.5 – Citrix (for most users)

- Each agency has min. 1 fat client running Logician, DocuTrak

Dartmouth – Logician 5.6 fat clients

- Mix of Windows NT and W2K Client PCs
- Wireless network; Notebook PCs in Exam Rooms
- File & Print via local Windows server
- 100 mbps Fiber Connection between buildings



Scanning Infrastructure

CHAN – decentralized scanning

- Mostly networked multi-purpose copiers
- Use s/w from copier vendor to move files to indexing location
- Use freeware (Alternatiff) to view attached documents via IE

Dartmouth – centralized scanning

- 3 Scanning workstations (Fujitsu 4110c & 4120c)
- 5 Indexing workstations (Standard PC's)
- All scanning done in Health Info Dept (2 staff)
 - About 1.5-5.5 inches per day; 2 hrs daily per person

MSO Support Services – scanning varies by client



Scanning Process

Scan documents

- Various programs available to support
 - Kryptiq recommends Adobe Capture
- Documents are stored in temp folder

Index & import documents

- Select/preview document(s)
 - Scanned, faxed or emailed files
- Index document (set properties & patient)
 - Can use standard or custom document types
- Import document into EMR
 - Can import as signed or unsigned



Common Workflows

CHAN:

- Most scanning is done by medical records staff
- Scan items initialed/reviewed by provider

Dartmouth: *(Started in July 04)*

- All documents "External Other"
- Summary line defines document
- Scanned anything initialed and sent by provider
 - If not signed/initialed scanned and routed to the provider's desktop for signature
- Changed process (Jan 05) on what to scan and how to import; developed policy to support



Common Workflows

MSO: *(Based on best practices)*

- Separate flow for preload vs daily scanning
 - Preload:
 - Prep charts (organize docs, copy if needed)
 - Scan patient by patient
 - All documents import as signed with disclaimer
 - Daily Scanning:
 - Upon receipt; sort by doc type and # of pages
 - Link to observation term as desired
 - All documents import as unsigned & route to appropriate EMR desktop



Lessons Learned

CHAN:

- Can be done without DocuTrak but not easily
- Don't give users permission to change preferences when using over a network

Dartmouth:

- Clearly define what to scan and naming conventions
 - Consistency/standardization is important
 - Policy development; frequent review of workflows
 - Audit quality of work
 - Don't stop looking for interface solutions



Lessons Learned

MSO: *(Based on best practices)*

- Carefully plan out intended scanning and processes
- Educate stakeholders on key considerations:
 - Document types and views; differences and benefits
 - This helps avoid mismanagement of filing documents
 - Changing document properties later is labor intensive when dealing with high volume
 - Demonstrate final setup prior to activation
- Don't underestimate resource requirements
 - Preload: # scanners and staffing; realistic productivity
 - Daily: placement of equipment and staffing
 - Chart auditing: allow time for auditing accuracy



Key Considerations

- Is preload scanning (new customers) desired? If so,
 - Weigh *desire* for entire chart against *necessary* info
 - Determine if separate document types are needed
 - Determine document separation (many:1 or 1:1)
 - i.e. all lab reports=1 "hx labs" document or each lab is a single document w/respective date & summary
 - Decision will greatly impact resource requirements
 - Determine timing for scanning – examples:
 - All scanning completed prior to go-live
 - 1st 3 months of patients scanned before go-live; ongoing thereafter
 - Scan several days in advance of appointment; ongoing



Key Considerations

- Will you utilize custom document types?
 - Identify and gain buy-in early on
 - Identify summary description standards
 - Determine document views to be used for organizing documents
 - Provide job aid for educating scanning staff on accurate indexing

- Will you utilize observation term linking?
 - Determine necessary terms early on; request custom if needed
 - Will you allow free text value or pre-defined values for document
 - Create worksheet for reference of document type:obs term link and associated values
 - Consider staff responsible for selecting/entering values



Key Considerations

- Will you import digital images or other files from another source?
 - Determine storage location
 - Identify handling process for faxed or emailed items
 - Educate staff on how to locate directory for indexing

- What will you do with documents that have color graphs?

- Consider equipment and resources needed:
 - How many scanners and support staff will you need?
 - Preload scanning may require more scanners and staffing
 - Will scanners be networked or local; consider placement



Key Considerations

- Identify training needs and timing early on:
 - Involve key staff in testing setup to ensure workflow efficiency
 - Provide worksheets/job aides to support staff:
 - Document indexing map
 - include standards for document dates and Summary descriptions
- How will you monitor scanning productivity and accuracy?
 - Plan for development of inquiries for chart auditing:
 - Accuracy of scanned documents (chart, document type and properties)
 - Accuracy of importing signed/unsigned
 - Develop process for correcting inaccuracies
 - Develop remedial training plan
 - Develop contingency plan for slippage in preload scanning