American Medical Management

DocStar®

Medical Firm Maps Future With Document Imaging

Company Facts

Overview
▶ Location: Baltimore, Maryland
▶ Industry: Healthcare
▶ Number of Employees: 250

Success Highlights

Challenges
▶ Tremendous paper needs necessitated a map to navigate through file cabinets
▶ Paper file storage was taking up too much office space
▶ Document management system was expensive and time-consuming

Solution
▶ DocStar® Enterprise Content Management (ECM)

Benefits
▶ Freed up office space and saved money by eliminating paper files
▶ Improved data security and disaster recovery planning
▶ Increased efficiency by making documents readily available
▶ Allowed pertinent information to be searched electronically
▶ Gave employees the freedom to access documents on-the-go

It takes an awful lot of work to handle all of the administrative details that come with running a successful doctor's office. Now, multiply that by 25, and you have an idea of what Baltimore-based American Medical Management has to deal with every day.

AMM has been around since the 1990s, and handles all of the back-office work for a network of more than two dozen healthcare centers staffed by 30-some doctors. The facilities include:

▶ Multi-Specialty HealthCare, a 20-year-old, multi-site provider of integrated services to individuals with neuromusculoskeletal injuries and chronic conditions;
▶ Harford County Ambulatory Surgical Center, an outpatient walk-in center that offers multi-specialty operating rooms, multiple procedure rooms and an endoscopy suite;
▶ Baltimore Work Rehab, a back-to-work treatment provider that combines traditional and aquatic therapy to get employees ready to resume work after an injury; and
▶ The Pain Management Center, a facility that serves patients who experience pain disorders that have not been responsive to ordinary pain therapy protocols.

All told, the company has nearly 250 employees. The headquarters professional staff provides a variety of management, billing, financial, facilities, staffing, training and executive services. All of these services generate paper—ranging from bills and benefits reports to leases and licenses.

The work generated so much paper that—according to Michael Erway, AMM IT Director—the company actually had to create and print a map to guide employees through scores of filing cabinets, just so they could find the documents they needed.

Even with the maps, all was not well at AMM headquarters. "We were running out of storage space," Erway says.

The need for space, coupled with a desire to cut costs and speed service to customers and medical facility staff, led Erway to consider options. The maps are now gone. So are most of the filing cabinets. And so is much of the paper. That's because in 2003, AMM decided to adopt document imaging and electronic document management as part of its move into the 21st century. And DocStar helped them make that move.

To get going, AMM worked with MEDI, a DocStar Partner based in nearby Millersville, MD. "In the beginning, MEDI explained indexing to us," Erway says, and they helped his firm set up templates and organizational structures for scanned documents. This pre-launch work helps company employees find documents in the system much more quickly and easily. "After that, it was easy for us to make adjustments ourselves," Erway adds. "They trained us on the issues and helped get us started, but it was something we controlled after that."

The majority of paperwork is scanned after the people are done working with it. "Individuals receive their own mail and/or other documents they need to work on," Erway explains. "They process it and then—at the end of the day— they'll put the documents into categories so the scanning staff can put them into DocStar."

That's pretty much the process the company used before going digital. Work then file. "It wasn't as much of a change as if we scanned everything up front," Erway says. "When they're done with their work, they index the documents just like they did when they were preparing to put them in a paper file."

AMM uses DocStar's optical character recognition to make locating documents even easier. This feature is particularly useful when it comes to transcribed medical records.

According to Erway, doctors dictate notes onto a server. Then another company transcribes the doctors' comments and provides AMM a document based on the dictation. "We import these Word documents into the DocStar server, and it automatically does the OCR," he says. "That way, we can search for any text within the document."

When documents are imported, certain standard information appears and can be used for indexing. "Certain fields—like name, Social Security number and date of visit—are always in the same location," Erway says. "We are able to pull those out of the document to create indexes." This gives staff two ways to search for documents—by the index or by searching 'OCR'ed' documents for key phrases. Searches could be done before through standard PC software, but that process was much slower.

Erway says staff adapted to the new DocStar system rather readily. "The DocStar system was easy to learn, pretty straightforward," he says. Key, he adds, is the preliminary work. "You just have to figure out what method of filing will be most advantageous," he says. "The more time you put in at the beginning to create the indexes, the easier it is to narrow down your search when you go to find something."

Erway also recommends conducting a benefit analysis of sorts when setting things up. "You need to judge the time it takes to scan and index documents and what it will take to retrieve them," he says. "In other words, if you have to scan individual pages just to get indexes down to the patient level, that may take too long."

It might be better to scan a document in bulk, and then scroll through the larger document to find the individual patient information needed. "That was the only fine-tuning we had to do," he says, "comparing the scanning and indexing time up front versus the searching time at the end."

Immediate Improvement

AMM saw some quick payback from its decision to go with DocStar. For starters, the company was able to free up about 4,000 square feet of office space—and the costs associated with maintaining it—by eliminating all of the filing cabinets and paper files. Employees who previously managed the bulk of paper filing were trained and now handle document scanning and electronic filing.

The company also was able to reduce its dependence on staff whose primary function it was to retrieve paper documents. "We had people requesting information all the time," says Erway. "Instead of having everybody go out and look for their own documents, we had designated individuals that would go and retrieve all the documents for them. We have no more runners now."

The move to electronic document management also freed up courier time. Paper is not being shuttled back and forth between the home office and the two dozen or so remote offices the headquarters staff supports.

In addition, using DocStar has helped with data security and disaster recovery planning. "We have all of the files not only on the server, which can be backed up, but we copy all of the images to DVDs and take those off site to a remote storage facility," Erway says. "So we have a server which has all of the documents, a backup of that server, and the DVDs, which serve as another level of backup."

Operational benefits

Much of AMM's work involves monitoring cases and ensuring open communication between healthcare providers, insurance companies and patients. That interaction depends on maintaining accurate descriptions of medical care and billing information. More than that, it requires that staff and partners be able to access that information quickly and easily.

Being able to retrieve right from the desktop, rather than looking for documents—or sending someone to look for them—in file cabinets is much more efficient. "Plus, once you do have an electronic file or folder, it's much easier to search through and find the document you're looking for." Erway says.

It doesn't matter where in the folder the information resides. It's searchable electronically. That contrasts with the way things used to be: "You'd pull out a paper folder that's a few inches thick, and the document you need would be in the back if you starting looking in the front, or vice versa," he says.

"With DocStar, once you search for and find a document, it's easy to click through the pages to find the specific document you're looking for," he adds. Or depending on how it was indexed, it's possible to find the document right away. Plus, employees don't need to first find the file cabinet map before they go searching.

Thanks to OCR, document text itself is searchable. Searching through text of documents on the DocStar server is more efficient than if the documents resided on a PC hard-drive. Server-based searches simply take much less time than Windows-based searches do.

A side benefit of using the DocStar server is document integrity. "Before, Word documents could be changed at any time," Erway says. "When they're imported and saved in DocStar's format, they can't be changed." He's referring to the AuthentiDate feature, unique to DocStar, which time-stamps documents—something that comes in handy when attorney's—or anyone for that matter needs—to vouch for their authenticity.

"Employees are definitely happier," Erway says. At least the ones that remember the days when AMM used the old paper method. "The newer people don't realize the benefit as much as the people that have been with us for a while," he adds. "But that's alright, we don't expect them to."

Broadening the impact

Benefits extend beyond AMM's headquarters. Now employees can have secure access to the DocStar servers—and the thousands of electronic documents they contain—from wherever they are. This includes employees who work in the remote offices—the various medical facilities the home office supports. It also includes three work-from-home staff members who access the server from their own location.

That's not all. "The outside billing partner we work with from Illinois also has access to specific documents," Erway says. Since the outside firm handles work for AMM, it's important that they be able to access insurance documents, explanations of benefits, claims paperwork and payment information. Now they can get that electronically, instead of having to call and have something sent.

Other partners are testing the electronic data transmission waters. For instance, Erway says, some insurance companies are now starting to receive electronic claims and electronic attachments. One, a leading local workers' comp carrier, is encouraging medical providers to send claims attachments electronically.

AMM is poised to do that thanks to DocStar, and expects to do so once its billing software can handle attachments. MEDI has been helping the firm devise a plan to integrate the DocStar document database with the billing software.

Moving forward

Erway says his firm is also exploring how it could create a Web portal that would allow partners to access and retrieve documents originated through DocStar. "That would save us a lot of time," he says. "They could just connect in and get documents when they need them, instead of having to call. If they could access documents needed immediately, that would certainly help all involved."

While such initiatives are in their infancy, they point to even greater efficiencies that can come from electronic document management. The groundwork is laid. Even today, when someone requests a document, staff members can send it directly from the DocStar system via fax or email.

The company plans to deploy a new practice management system within the next several months. "Along with that, we'll have electronic medical records integrated with the practice management system, and then DocStar will be a big part of that," Erway says. When that occurs, the company will be able to push scanning out into each of the remote sites, and allow for even speedier access to documents system-wide.

Erway notes that MEDI has been supportive through implementation and beyond. "They've been very helpful as we've been looking at other software and what it will take to integrate DocStar into that," he says. "They came out and gave us all the options. Also, when we started scanning at a remote site and had bandwidth issues, they helped us get that straightened out. They've been very helpful."

Even with help from DocStar and MEDI, Erway clearly has some work ahead of him in moving his company forward with imaging and electronic document management. Fortunately, one thing he won't have to do is create any more maps.

About DocStar

Helping businesses translate vision into action for more than 20 years, DocStar delivers a flexible and innovative enterprise content management and process automation platform. Easy to implement and use—both in the cloud and on premises—DocStar proven technology and global process expertise empowers organizations to operate at peak performance, navigate change, and grow.

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