

## **The Paperless Office - Notes from Many Sources**

This document contains 4 pages of notes on the subject of "going paperless". These notes have distilled from several articles in Vet Economics, and a variety of internet sites. At this time, the notes are not highly organized and are somewhat general because the specific detailed procedures necessary for success will vary widely from one clinic to another.

If you were to summarize the major factors for a successful paperless implementation, we believe they would be:

1. The total commitment of the entire organization
2. An abundance of accessible workstation computers
3. Redundant backup procedures
4. Contingency plans and quick recovery procedures.

It also appears that you should have some clearly defined guidelines as to the records that you want to keep for each patient for each type of visit. For example do you record an full set of vitals for every visit or just certain types of visits. These types of policies and procedures must be defined by each respective clinic.

In reviewing the information we have gathered so far, it appears all the capabilities necessary to go paperless are present in the Complete Clinic Software. However, we are continually working on areas where we can improve the system to make it easier for you to accomplish paperless record keeping.

We welcome feedback from anyone regarding this subject or whether any of this information was helpful. We are specifically interested in your thoughts as to what else we can do or provide that would make this process feasible, and any thoughts you have regarding improvements in the software that would make your job easier.

### **One Example of Success**

So, what exactly does a paperless medical practice look like? The Hurowitz Medical Group has computer terminals in all four of its examining rooms and in every other functional area, for a total of 16 networked computers. The computer system not only contains each patient's computerized medical record but also includes all of the practice's business records, including an electronic schedule and billing information. The system is backed up every day onto three separate systems and once weekly onto a different system.

When a patient comes in for a visit, Dr. Hurowitz explained, he can immediately bring up his or her medical record on the computer in the examining room, so both he and the patient can see everything. In a few seconds, he can review notes from his last visit with the patient or quickly review the results of any significant tests or treatments the patient has had. As patients explain their medical problems, he types notes directly into the record.

"They can even correct me if I'm wrong," he said. "They love seeing what I'm saying."

The computerized records allow him to quickly review the medications his patients' have been taking so he can assess dosages and help his patients with compliance. If a patient has to be referred to a specialist, with one tap of a key Dr. Hurowitz can provide the doctor with a comprehensive two-page medical record with the patient's complete history and the reason for the referral.

"It's the way medicine should be practiced," he said. "We just don't have to spend a huge amount of time looking for data, like a mammography that might be abnormal.... And because of computerized medical records, we can review in a very short period of time all of a patient's problems. So, from a

quality-of-care issue, the benefits have been amazing.”

But it's just not the quality of Dr. Hurowitz's patient care that has improved. Computerized medical records also allow him to provide more comprehensive examinations and, thus, bill at a higher coding level, he said. "So, my revenue for seeing fewer patients per day is therefore higher than a doctor seeing many more patients a day," he added. "So, I think that on that level everybody wins. The patient wins by having better care and spending more time with the physician, and the physician can get compensated at a higher rate."

## **PRACTICE MANAGEMENT SOLUTIONS FOR YOUR OFFICE**

### **Removing the Obstacles to the Paperless Office**

Reasons offices are reluctant to move to electronic medical records

- **It is not the way we do it:** The paper chart is very comfortable for clinicians because that is how it's always been. Despite the fact that some studies report that finding a chart is difficult 30% of the time and finding information in that chart can prove challenging, having a hard copy chart has always been a security blanket of sorts for physicians.
- **I don't know where to start:** Most physicians look at it like an insurmountable project. Physician support staff usually is responsible for the maintenance, problem solving and structuring of office procedures. EMRs require physician involvement.
- **It is too expensive:** Many physicians, when considering an EMR solution, begin to add the price of add-ons (such as voice recognition) as well as hardware such as printers, scanners, etc. and determine that combined with the price of the software and software support, that quantifying the return on investment is difficult.
- **It's unreliable:** One of the biggest fears surrounding an EMR is having a patient's record crash and lock the information. Granted, computers (like people) are susceptible to periodic break-downs, but backups of data and mirroring computers work around these problems.
- **It decreases productivity:** Many practices equate the down time of implementing a new software system with wasting money because losing time equals losing money. The key goal of an EMR is to improve efficiency. Reports show that practices that implemented EMRs within the past few years have shown significant increases in the amount of work and patient loads handled.

There are several more reasons that have been stated as primary reasons for not switching to an EMR. Nevertheless, things are changing.

### **Paperless Advantages!**

1. Save space dedicated to storing patient files.
2. Avoid missed charges for procedures performed.
3. Ability to update patient record from any computer reduces time searching for lost files or information.
4. Ability to easily transfer copy of practice data to home computer or access practice records via modem.
5. Easily create complete printed history for referral or client relocation.
6. Easy to generate callback lists to increase client satisfaction.

## **How Does it Work?**

1. During an exam you call the patient's record up on the monitor.
2. From the patient record, you can quickly review the patient's medical history and easily add new history.
3. Open an invoice, post charges, save as hospital invoice until time for checkout
4. If technician needs to perform lab work or take an x-ray, they can call up the hospital invoice on another terminal and add these charges.
5. For complex cases, open a SOAP record. Use the general medical note to enter quick comments for simpler matters.
6. For surgeries or complex procedures, use estimates and obtain client signature
7. Create billing macros to speed billing standard procedures.

## **Keys to Success and Other Ideas**

1. A workstation computer in every room.
2. A foolproof and redundant backup system.
3. A commitment from every practitioner and employee.
4. Increase revenue by using 2nd and 3rd reminders.
5. Remind for exams, spays, neuters, medication refills, etc. as well as vaccinations.
6. Organize your inventory into meaningful categories
7. Set minimum balance and reorder quantities for all items or at least all significant items.
8. Set target markups and ensure cost is kept up to date to facilitate entering price changes.
9. Make sure you are set up to charge service charges on client accounts.
10. Utilize system capabilities to do target marketing.

## **Backups and Contingency Plans?**

If your only source of data is your computer system, then you need a foolproof and redundant backup procedure with the ability to quickly restore and get an alternative system operational within minutes.

### **General Recommendations**

1. Backups must be run daily and twice daily if possible
2. Multiple generations of backups must be preserved to facilitate data recovery for 1 year or longer.

For example:

- a. Rotate and save daily backups for 6 days
- b. Rotate and save 4 weekly backups

- c. Rotate and save 12 monthly backups
3. An operational off site system should be maintained.
4. Multiple types of backups should be performed e.g.. tape and disk

### **Other Suggestions**

1. Standardize your hardware wherever possible to make workstations interchangeable
2. Standardize the version of your operating system
3. Standardize your computer configurations. For example designate the server hard disk is as drive F to all workstations or give your network printers the same name on every workstation.
4. Make Workstation computer names simple and logical and label the computer with the computer name to make it easier for employees to work with technical support people if needed.
5. Configure your network set up your backup procedures to make it easy to convert a workstation into a file server computer.

### **Keep Your Network Safe From Storms!**

Hot summer months, coupled with increased power consumption, cause fluctuations that can wreak havoc on your PCs (and telephones!) as well as any other sensitive electronic devices in your office. By taking a proactive approach, you can dramatically reduce your risk of storm damage.

- Make sure every piece of sensitive electronic equipment has some type of surge protection: Power strips are nice but for your practice, invest in a business-grade surge suppressor from a manufacturer of power protection devices, such as American Power Conversion.
- Don't overlook your data lines: In addition to coming through your electrical outlets, power surges and spikes can go from telephone circuits to your network card or modem and literally fry the inside of your PC. Data line protection adds the an additional circuit protection, whether your data line protection is included in your business-grade surge protector or a stand-alone, and is especially essential for practices using ISDN, xDSL, DSL, fractional T1/T3 and cable modems.
- Install battery backup units: While a basic surge protector will protect your office equipment from getting burned, having a battery backup unit (uninterruptable power supplies (UPS) units) will provide continuous power during brown/blackouts so you can close any open files or shut down your computer properly.
- Test your battery backup unit and monitor the log files: To determine how good or bad your utility power is, check your UPS software program's log files. Even more importantly, make a point to do the "pull the plug" test a few times a year by literally pulling the plug from yours UPS out of your electrical socket, watching your watch, and making sure your UPS handles like it's supposed to during a blackout.
- Don't piggyback surge protectors/UPS to each other: If you piggyback your surge protectors or battery backup units to each other, you're defeating the purpose of having these units. Piggy-backing causes a major safety hazard and less capable devices such as extension cords remove the protection of your UPS and surge protection units.
- Watch for the Site Wiring Fault light: Most business grade surge protectors and nearly all UPS units include an LED indicator for site wiring faults. A site wiring fault usually means that your third wire on a standard North American electrical outlet is not properly connected to the ground. If you experience this problem, call a licensed electrician and get this checked out ASAP.

By maintaining proper safety protocols for your network, your summer can be better spent enjoying the outdoors!