



## How an integrated delivery network maintained speedy, accurate document indexing during EHR switch from NextGen to Epic

The decision to change from one EHR to another isn't made lightly. That's because despite the many benefits, changing EHR vendors can cause significant disruption in access to patient health information. Patients are put at risk by backlogged or inaccurate documentation.

Fast and accurate medical records scanning and indexing is an essential step in the process of providing quality care. But even on the best of days, keeping up with fax and scan document management and accurately indexing data to patient records is already a challenge.

- ✓ Clinicians are forced to evaluate patients and make decisions from incomplete data.
- ✓ Patients have to wait days longer than necessary to receive important test results.
- ✓ Administrative staff are overburdened by incoming documents, fragmented workflows, and repetitive data entry.
- ✓ Physicians get caught in the cross-hairs of document processing, especially at smaller clinics that shoulder the burden of record indexing.

The risk of falling behind or inaccurately indexing data intensifies during an organizational transition, like changing EHR vendors.

When this St Louis-based integrated delivery network (IDN) decided to make the switch from NextGen to Epic, they worked with DISC to make the transition as smooth as possible. On their go-live date, they achieved their ultimate goal: to keep patient health information accessible and accurate at all times so their providers could give the best care, without interruption.



Hundreds of providers in 50 locations use SmartFiler by DISC



7000 pages of medical records processed per day with SmartFiler



Maintained indexing capabilities before, during, and after the EHR switch



DISC staff provided strategic guidance and training through the EHR switch



EHR: NextGen, Epic

## About the IDN

As one of the largest nonprofit healthcare integrated delivery organizations in the country, they are headquartered in St. Louis, Missouri. Their hospitals and clinics serve the residents of greater St. Louis, southern Illinois and southeast Missouri regions.

With incoming records from so many patients, providers, and locations each day, this organization needed a technology partner who could handle the custom rules and unique needs within ambulatory medicine. They chose SmartFiler by DISC to duplicate their workflow and automate their labor-intensive process.

DISC specializes in collecting data from medical records, especially from e-Fax, and converting it into more accessible formats. What sets DISC apart from other solutions is the human element in the indexing process, called attended automation. This human validation of documents is responsible for the 99.9% accuracy rate that ultimately helps keep patients safe.

Starting with 5 locations in 2014 and expanding to 50+ by 2021, their clinics implemented DISC's SmartFiler and saw immediate improvement in their indexing speed and accuracy. SmartFiler helped them standardize the processing of non-integrated medical record fax and paper documents, beginning at 700 pages per day with SmartFiler. By 2021, the organization relied on SmartFiler's technology to process 7000 images per day with 99% accuracy.

With over 100 locations and 600 providers, standardization of medical record filing is difficult. SmartFiler is nimble and allows for custom rules based on our unique needs within ambulatory medicine. Now our staff can focus their time on the most important part of medicine, taking exceptional care of our patients.

— Director of HIM



## Moving from NextGen to Epic

When they began their engagement with DISC, this large organization used NextGen to manage their patients' electronic health records. They wanted to be sure that nothing would impact their indexing speed and accuracy when they switched from NextGen to Epic.

At that time, little was known about how moving to Epic might change their indexing workflows or affect document processing time. And because their indexing model was decentralized, a single team was not in charge of managing that change. Several months before the scheduled "Go Live" with Epic, DISC was brought in to ensure a smooth transition.

That's when several challenges became apparent.

- ✓ **Epic did not have an internal document management system.** Instead, users must purchase add-ons, such as OnBase™ or another system.

*Why this mattered:* Limited information or training about possible changes to the indexing workflow was made available to the organization.

*How DISC helped:* DISC developed indexing workflows to work with Epic, while providing the organization with strategic guidance and training.

- ✓ **Epic adds additional requirements to their documentation.** Why this mattered: Epic's requirements means it takes many more clicks and steps to index documents manually, which slows processing time by 20-30% and can also affect accuracy.

*How DISC helped:* By using SmartFiler to index documents, the organization wasn't slowed down by the additional clicks and steps to process a document in Epic. Instead, SmartFiler's attended automation service ensured that every document was accurately filed within 24 hours, just as it had done with NextGen.

- ✓ **Epic document type labeling includes an open-text description field to further define the document.**

*Why this mattered:* Technologies like SmartFiler rely on clearly defined document type and description data. Other EHRs only offer pre-defined lists to choose from. An open-text field could generate innumerable descriptions that would hinder accurate filing.

*How DISC helped:* DISC helped the organization define their document type lists and create policies that they would use for both SmartFiler and their internal filing.

DISC helped them navigate and develop solutions to each of these challenges in time to meet their projected Go Live date without impairing their indexing speed or accuracy.

Fifty locations (and still counting!) have chosen to implement SmartFiler, with many coming on since the switch to Epic. These clinics save tens of millions of clicks by staff in OnBase per year.



## Conclusion

Far-reaching organizational changes, such as switching EHRs, could have created major disruptions for this IDN:

- ✓ Document types changed from one EHR to the next
- ✓ Additional clicks-per-page took staff 20% more time to index
- ✓ Bottle-necked indexing stalled the transition to central fax and scan management

Fortunately, IDNs like this group in St. Louis discovered a better way to handle their medical record indexing: SmartFiler by DISC.

- ✓ Instead of falling behind, they caught up and improved efficiency.
- ✓ Instead of finding errors to fix, they now boast 99.99% accuracy.
- ✓ Instead of being stymied by missing records, physicians have the information they need to treat patients..

When it's time to make a change that could impact the speed and accuracy of medical records indexing, choose a technology partner who optimizes your health information management workflows with cutting-edge technology and great people.



Considering a switch to a different EHR and wondering if your indexing will suffer during the transition? Discover how your processes could be more efficient and accurate, regardless of your EHR.

Sign up for a free audit and executive report. See how much time DISC SmartFiler can save you!