



How a multi-specialty medical group improved fax and scan workflows while switching from NextGen EHR to Epic EHR

When it was time for a Michigan-based, multi-specialty medical group to switch EHRs from NextGen to Epic, they wanted to be sure the inevitable disruption of the change wouldn't affect patient care. A top priority was ensuring patient health information would remain accessible and accurate at all times, so providers could give the best care, without interruption.

To do this, their automated document scanning and indexing would need to stay on track. But different EHRs have different requirements, definitions, input fields, and processes. These significant differences could multiply the potential for errors and document backlog in the indexing process if the transition isn't flawless.

As they prepared the rest of their organization to switch from NextGen to Epic, they worked closely with DISC to be sure their fax and scan workflows would switch over with little to no disruption on their go live date.

In fact, not only did they not fall behind, but they doubled the number of records they scan and index each day as they went live with Epic.



500+ providers in 150+ locations



500,000 active patients



14,000 documents processed per day



Reduced chart management staff by 40%, shifting those resources to other IT-related needs



No document processing downtime on EHR go-live date



EHR: NextGen, Epic

About the Organization

As one of the largest multi-specialty medical groups in Michigan, this organization is known for providing simple, smooth, and hassle-free patient experiences. They experienced rapid growth through acquiring new practices.

While this organization was proud of their effective workflow when it came to manually filing documents, they knew that their full-time staff would soon be overwhelmed as their network continued to grow. They did not want to add more staff resources to keep up with indexing. Instead, they wanted to shift their staff resources from document management to other IT-related needs.

They chose a technology partner who could duplicate their workflow and automate their effective but labor-intensive process: SmartFiler by DISC.

DISC specializes in collecting data from medical records, especially 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.

The organization transitioned from their manual document filing to automated filing in phases, beginning with hospital and radiation documentation. Satisfied with DISC SmartFiler's speed and accuracy, they soon centralized the filing of all electronic fax documents to remove the burden from individual practices.

The SmartFiler team has been incredibly responsive overall. With our continued growth, we are now confident we have a strong, automated filing solution we can count on going forward. We're thrilled overall.

— Clinic Application Manager



Moving from NextGen to Epic

When this group decided to change EHRs from NextGen to Epic, they were concerned that their indexing may be affected. They informed DISC of their plans about a year before their go-live date. DISC prepared them for the specific challenges this multi-specialty medical group would face:

- ✓ **It takes staff 25% longer to process a single document in Epic than in other EHRs.** For every 100 providers, that's enough to keep several more people busy all day, every day, when they switch to using Epic.
- ✓ **Changing EHRs means updating document types, re-defining input fields.** Teams must be equipped to strategically define and file documents in a new way, and that training is rarely provided in detail by any EHR.

To support their transition from NextGen to Epic, DISC immediately took the following steps:

- 1. Redesigned and rebuilt the document type list.** Because SmartFiler is built off the list of document types, DISC redesigned their system to match Epic's requirements and document type list.
- 2. Provided strategic guidance on Fax & Scan workflows.** Even before the change in EHRs, DISC was helping them index incoming electronic faxes and scan documents. This never stopped or slowed down through the transition.
- 3. Offered hands-on coaching in OnBase™.** Recognizing that some documents would continue to be filed internally using the OnBase add-on, DISC made sure the group's team understood the necessary adjustments they would need to make in their indexing process.
- 4. Coached decision-making on document types.** As a member of a larger organization, the group had some ability to influence the document types and user-defined fields. DISC coached their team on best practices to limit the potential for errors in indexing. This improved their own internal filing capabilities while also meeting SmartFiler's requirements.
- 5. Connected them to Epic customers who also used SmartFiler.** Sometimes, it's just easier to see how another organization uses technology! Recognizing that candid interactions with peers can be just as helpful as working with a product support team, DISC facilitated an introduction.

This Michigan-based group appreciated DISC's compassionate and open communication as they made the necessary changes to their documentation and indexing workflows.

DISC prepared us for our recent switch from NextGen EHR to Epic, going above and beyond in many ways. Without their guidance about document type lists and additional indexing requirements for Epic, we wouldn't have been able to make such a smooth transition. As a result of their hands-on coaching, we've also improved our internal filing policies. We have recommended the DISC team to other organizations.

— Director of IT





Conclusion

Far-reaching organizational changes, including centralizing medical record indexing and switching EHRs, could have created major disruptions:

- ✓ Document types change from one EHR to the next
- ✓ Additional clicks-per-page would take staff 20% more time to index in Epic
- ✓ Skilled IT staff would have shifted to document processing
- ✓ Bottle-necked indexing would stall the transition

Fortunately, medical groups like this Michigan-based group have discovered a better way to handle their medical record indexing: SmartFiler by DISC.

- ✓ Instead of falling behind, they catch up and reallocate staff to improve efficiency.
- ✓ Instead of fixing errors, they 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.



Curious if your indexing could be more efficient or accurate, or concerned that a change in EHRs could hamper your workflow? Sign up for a free audit and executive report. See how much time DISC SmartFiler can save you!