One Patient, One Record:

How Allina completes an award-winning EHR with enterprise content management

OnBase
a Hyland Software solution

*More than 20,000 users access content from OnBase
without leaving Allina's 4 million patient records*

Executive Summary

To give patients the best care possible, Allina Hospitals & Clinics set a goal of "One patient. One record." However, even with an electronic health record (EHR) as strong as Epic about to be implemented across the health system, Allina knew it wasn't enough. Up to 25 percent of patient information would still exist outside of the patient record – paper, forms, faxes, clinical images and more.

Beyond the EHR, paper and disconnected systems slowed down care and operations in departments across the health system – from Accounts Payable and Human Resources to the Laboratories and Home Health Care.

To work better and faster from the bedside to the back office, Allina chose the OnBase enterprise content management (ECM) suite. OnBase allows Allina to capture patient content and make it a mouse-click away in Epic. Allina also uses ECM to automate manual processes system-wide and integrates it with software applications like GE and Lawson.

Read on to learn why and how Allina uses ECM as a core IT system. In this in-depth enterprise case study, you'll learn:

- Why each area at Allina needed to eliminate paper
- How these areas deployed ECM
- How Allina leverages its technology investments and minimizes IT resources with one ECM solution system-wide
- The real results that improve patient care and the bottom line, realizing a return on investment in less than one year

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No more chart pulls:
HIM solution completes EMR; saves on storage, space

The Basics

Through 11 hospitals and more than 60 clinics, Allina provides exceptional care throughout Minnesota and western Wisconsin. With 1,821 beds, the health system had 1.2 million hospital outpatient admissions and 4.5 million clinic visits last year.

The Challenges

Even with Epic in place, Allina realized that many of these visits would still require HIM to pull charts and physicians wouldn't have a clear view of a patient's history.

- Up to 25 percent of information existed outside of the Epic EMR, preventing a full patient picture
- Clinicians need one place for information so they could spend more time with patients
- Too much time and labor was needed to pull charts

The Solution

Each time a patient returned to Allina for care, caregivers had to request existing medical record information from the HIM department. Then, HIM staff had to retrieve the physical record from an onsite file room or offsite storage vendor. Finally, it was sent back to the requestor, who could use it for patient care.

To achieve the "One patient. One record." goal, Allina had to make this information immediately available in the patient record. The first step was choosing the Epic EMR. However, because Allina knew that Epic didn't easily collect some information, like forms, notes, paper charts, etc., step two was choosing to rollout OnBase at the same time.

Creating a 100 percent electronic record
Today, paper from patient charts is sent to each facility's HIM department. HIM scans it in and OnBase automatically indexes it with information from Epic through HL7 messaging. The integration supports the capture of patient documents throughout a patient's visit, from registration and points of care to the billing cycle.

All of a patient's information, whether originating on paper or as an electronic file, is in a single place. Caregivers simply click on a link in Epic and relevant patient documents pop up. The Epic/OnBase solution is a core application for more than 20,000 employees.

With the success of the EHR project,

HIMSS named Allina the sole recipient of the Nicholas E. Davies EHR Recognition Program in 2007.

Electronic documents safer than paper
Although patient information is easier to access, OnBase maintains strict HIPAA compliance. It protects patient privacy through security measures that limit access to only those who need it. OnBase also offers audit trail tools to see who has viewed or modified documents.

The Results

- Creates a true EHR with complete patient information for 20,000 employees
- Gives physicians more information to make better care decisions
- Protects patient privacy and follows HIPAA guidelines
- Decreases paper, storage and labor costs

Integration

Epic EMR

HIM departments scan paper documents into OnBase and they immediately become part of the EHR. Caregivers simply click a link in Epic and the relevant patient content from OnBase pops up. Users don't need to learn a separate system or switch between applications. Training is minimal and adoption rates are high. Plus, the integration allows for automatic indexing, so there's no redundant data entry or risk of human error and productivity goes up.

OnBase is integrated with the following applications from Epic:
- ADT®/Prelude® enterprise registration and inpatient access software
- Prelude® enterprise registration and ambulatory patient access software
- Resolute® billing software
- EpicWeb® provider access software
- EpicCare® clinical software

Taking paper out of the revenue cycle from start to finish

The Basics

Making a good first impression on patients starts with an efficient registration process. But it's also the critical first step in the revenue cycle. After patient discharge, keeping this information in step with the rest of the revenue cycle is crucial to collection.

The Challenges

After deciding to standardize with OnBase, Allina wanted to eliminate various document management solutions that existed in different departments, such as Revenue Cycle Management (RCM) and Transportation Billing. The health system also wanted to put patient registration in the same system so all billing content would exist in a central repository.

- Registration staff had to collect insurance cards and identification at every visit, even if a patient registered at multiple sites in a single day
- After discharge, Allina wanted all patient documentation quickly accessed in one place

The Solution

All revenue cycle documentation is now centralized in one document management system. Authorized users across the health system access needed billing information, improving patient satisfaction and revenue cycle processing.

More convenient for patients, faster for registration
At patient registration, OnBase integrates with Epic at all of Allina's hospitals and clinics. Staff members enter patient data into the EHR and then scan in needed documents, such as identification, insurance cards and consent forms. They are automatically indexed using data from Epic and attached to the patient record. This eliminates human error and guarantees all information is stored together for future visits.

When patients return, information is just a mouse-click away. Instead of patients producing all of their information again, staff quickly verify their information. Patients need only present IDs or insurance cards again if they have been updated since their last visit.

Managing EOBs consistently – no matter where or how they originate
After a patient is discharged, ECM continues to speed up the revenue cycle. Both RCM and Transportation Billing scan paper EOBs and import those received electronically (via 835 processing). They are automatically indexed into OnBase with information pulled from the billing software.

Users retrieve the formerly paper EOBs with just a mouse-click in Resolute. Since staff members prefer the format in OnBase, electronic EOBs are opened in the document management solution.

Reduce space? No problem when all of your documents are electronic
Because RCM staff can securely access documents they need offsite, some of the payment posters now work remotely or from home. Not only does this improve employee satisfaction, it also frees up needed office space for other departments and patient care.

The Results

- Improves patient experience at registration sites
- Puts EOBs in one place – whether received electronically or on paper
- Allows RCM to handle space constraints and improves employee morale

Integrations

Epic Prelude and ADT/Prelude
When a patient registers, staff members verify insurance cards and IDs in Epic. If they aren't there, staffers scan the necessary documents. When needed, patient billing professionals also access the documents.

Epic Resolute
RCM scans paper EOBs and imports electronically submitted ones. Users retrieve EOBs originating on paper simply by clicking on a link in Resolute.

AR 2000 Billing System
Allina Medical Transportation indexes scanned documents with values taken from the AR2000 billing system, and users quickly retrieve the EOBs in OnBase.

AP and HR:
Speeding processes in
the back office

The Basics

Paper isn't just a problem in one or two departments – nearly every area in a healthcare organization suffers from too much paper. Administrative offices, like AP and HR, are certainly no exception. Paper slows them down – perhaps more than anyone. However, in an age where healthcare costs are soaring, health systems have to make sure they're maximizing operational efficiencies.

The Challenges

Although AP, HR and other administrative departments perform very different functions, they experience many of the same frustrations:

- Paper creates inconsistent and inefficient business processes
- Software applications only handle data, not documents
- Compliance and audits are a constant worrisome struggle

The Solution

Allina's AP and HR departments solved these problems by centralizing all documents into OnBase and integrating them with their line-of-business applications.

Lawson integration speeds data entry for more than 40,000 monthly invoices
Each month, Allina's centralized AP department receives 40,000 paper invoices, plus EDI invoices. AP scans or imports all of the invoices into OnBase. Staff members enter data into Lawson from the image displayed on a second monitor. Then, they hit a hotkey and the data transfers to OnBase, automatically indexing the invoices. There's no duplicate data entry and values in each system are sure to match.

Capital Asset Management also takes advantage of the integration. One capital request may have multiple invoices and OnBase ties them together. Staff working in Lawson just double-click and a list of all related invoices pop up. They have all the invoices they need – without hunting and searching through folders and files.

And with documents in OnBase instead of file cabinets, it's easier for AP to comply with retention policies that range from seven years to forever.

Making a difference 23,000 times: response time to employees cut in half
With 23,000 employees and 20 business units, staying on the same page isn't easy for the HR department. Paper only made communication and consistency tougher. HR needed to standardize processes, but let the business units keep their independence. With OnBase, the department does just that.

"OnBase has helped us comply with Joint Commission audits. Within months after OnBase was implemented, a surveyor showed up unannounced at a regional hospital for a spot lab review. The manager called in a panic, but not only did the audit go fine and quickly, the surveyor was wowed by the system."

-Lynda Laskow, Human Resources Director

HR has automated many of its tedious jobs with OnBase. It automatically performs tasks behind the scenes to create cases, update documents and perform mass changes. In addition, when an employee requests information, HR doesn't have to physically pull an employee file. Response times are now 50 percent faster. During its annual benefit confirmation, HR no longer hires temporary staff because the information is already in OnBase and doesn't need to be printed and filed into folders.

"OnBase has also helped us in our ability to comply with Joint Commission audits," says Linda Laskow, Human Resources Director. "Within months after OnBase was implemented, a surveyor showed up unannounced at a regional hospital for a spot lab review. The manager called in a panic, but not only did the audit go fine and quickly, the surveyor was wowed."

The Results

- Gives AP staffers more time to spend on processing and exceptions, not dealing with paper
- Reduces HR response time to employees by 50 percent
- Reduces time, labor, costs and risks associated with records management and audits

Integrations

Lawson™ Financials
AP processors key invoices into Lawson while viewing the invoice in OnBase. The information is then applied to the invoice in OnBase for single step data entry. In addition, users who need to refer to invoice and capital request documents retrieve them directly from the appropriate Lawson screens.

BMC Software Remedy® CRM
When employees put in a request, it opens a case in Remedy. In the past, the request would have required HR to locate the employee file manually. Now, staff views the related document directly from links on the Remedy screen.

Oracle® PeopleSoft® HR Software
PeopleSoft reports (e.g. payroll reports, benefits statements) are archived in OnBase, which uses PeopleSoft files to automatically index documents as well as make any mass changes to documents.

Innovating document management solutions across the health system

"It's easier to see patterns, such as missed courier stops or mislabeling at a particular site. Before OnBase, there was no opportunity to step back, look at these trends and address them."

-Bonny Paetznick, Reference Lab Director

The Basics

Many health systems use document management to enhance medical records and speed business processes. However, paper problems aren't just limited to those areas. They extend to multiple departments in a health system. Allina is continually innovating new and better ways to use document management as the tool to solve these problems. Three key innovative areas are Allina's Reference Lab, Medical Laboratories and Home Health Care unit.

The Challenges

The Reference Lab needed to eliminate paper and track issues within the lab. Allina Medical Laboratories needed to ensure policies were up-to-date and in compliance. In Home Health Care, associates needed documents on their laptops. In all these areas:

- Trends and common mistakes were difficult to spot, preventing the Reference Lab from proactively addressing them
- Patient and billing documents took too long to find
- No standard for pushing out policies and procedures led to compliance issues
- Associates need to spend as much time as possible with patients

The Solution

By expanding OnBase into the Reference Lab, the Medical Laboratories and Home Health Care, Allina extends ECM's ability to improve patient safety, increase efficiency and make life easier on caregivers.

8 million tests, one solution to track issues

The Allina Reference Lab manages more than 8 million lab tests per year and paper was bogging down areas across the lab.

With any lab, issues arise while processing lab results – couriers might be late, labels can go missing or get mismarked, specimens get too warm or too cold and more. When an issue occurs, processors fill out an OnBase E-Form with the error to record it. Monthly reports reveal trends on issues found within the lab based on customer error, processing error or even courier error. The Lab spots problem areas and trends and proactively resolves them.

On the billing side, many departments including Operations, Customer Service and Billing, have immediate access to the documents. If they need to see a requisition, they just click in the XIFIN accounts receivable system to open it. With quicker access to requisitions, Allina processes bills more efficiently and improves customer service.

Improving policy knowledge and revisions

Without a standard for pushing out policies in the Allina Medical Laboratories, it was easy for staff to overlook one or miss updates. With OnBase, policies are stored and monitored in one place. Allina tracks which medical director signed a policy and when, and new employees are sure to have the most recent versions. Allina is now always ready for an audit by the College of American Pathologists (CAP) or the American Association of Blood Banks (AABB).

If a policy needs revisions, OnBase routes a draft for review. After it's finalized, OnBase sends it to a medical director to approve. After 11 months, OnBase sends another reminder so staff don't have to remember every review, nor do they have to wait for slow paper approvals of changes. Policies are always updated on time, keeping Allina in compliance.

Home Health associates have more time with patients

Allina Home Health Care scans patient care and billing documents into OnBase. Associates have patient documents on their laptops, so they don't need to carry or search through file folders, giving them more time to spend with patients. Documents are also more secure with granular security settings and automatic audit trails and document histories.

The Results

- Improves lab issue tracking to reduce errors
- Ensures policies are read to improve compliance in the Lab
- Gives associates more time to spend with patients

Integrations

GE Centricity® Ultra Laboratory and XIFIN® Accounts Receivable System

To unite GE with XIFIN, Allina integrates them both with OnBase. UltraLab sends requisition result data to OnBase and XIFIN. Lab staffers scan in the requisitions and OnBase automatically indexes them. If information on the requisition doesn't match what's in UltraLab, OnBase catches the mistake and notifies the managers before it gets to Lab Billing, reducing mistakes made in both systems.

Cerner Corporation BeyondNow® Homecare Software

Using HL7 messaging, OnBase pulls information from BeyondNow to index 5,000 clinical and financial documents per month. Associates access patient information securely on their laptops so they spend more time with patients, not paper and folders.

Conclusion: A complete ECM strategy

For Allina, ECM is much more than just a tactical and departmental software system. It's a strategic, system-wide investment that delivers real value. It reduces paper and storage space expenses, while lowering labor costs by improving productivity. By adopting OnBase across the health system, Allina leverages its technology investment to minimize IT resources, enhance its existing applications and increase the value of the solution.

From registration and points of care to the billing cycle and AP, Allina eliminates processes that add time, frustration and cost without adding any value. That's why Allina achieved a complete return on investment within a year of the initial implementation and continues to save year after year.

As healthcare organizations across the U.S. strive to implement EHRs, Allina is an ideal model for EHR strategy. They have a truly complete patient record, one that incorporates the information existing outside of EHR technologies. Most importantly, Allina has improved patient care, safety and security across the health system, realizing its "One patient. One record." vision.

In the first year, Allina realized a complete return on investment and continues to save year after year with OnBase

time to make a difference.

Get more information out of existing business applications. Reduce, even eliminate, wasteful, redundant tasks. Now you can spend your time on the things that really matter. That's effective document and process management.

That's the OnBase difference.

Learn more at Hyland.com

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