

case study



Oaklawn

Moving a Department In-House with the Help of DocuWare

This mental health treatment facility utilized DocuWare to move their Patient Financial Services department from being outsourced to an in-house department. Thanks to DocuWare: customer service, cash flow and department efficiency have improved and the organization is easily able to meet HIPAA requirements.

Oaklawn is an inpatient, residential and outpatient mental health hospital that provides a range of comprehensive services for children, adolescents, adults and seniors with serious and persistent mental illness or addictions. With over 500 employees, Oaklawn acts as the community provider of mental health services for Goshen, Indiana and the surrounding area. Sponsored by Mennonite Health Services Alliance, the center focuses on treating the whole person - mind, body and spirit.



OAKLAWN

Toward Health and Wholeness

Documents

Oaklawn's new Patient Financial Services department needed the ability to store and access Explanation of Benefits (EOB) forms, check copies, managed care contracts, clinician credentials, patient financial records, payment agreements, patient insurance cards, prior authorization and privacy forms.

Work Processes

For five years the Patient Financial Services department was outsourced to a third party. In order to gain tighter control over information and payment processes, Oaklawn decided to bring the department in-house.

"I was hired to start up the Patient Financial Services department and was told I had 115 banker boxes of information to bring over and essentially no storage space. I knew we needed an electronic storage system that could be implemented quickly," said Beth Arter, Director of Patient Financial Services.

Solution Requirements

With an entirely new staff, Beth Arter needed an integrated document management solution that was easy to install, learn and use on a daily basis. The solution should not hamper the new department's workflow or consume limited office space. She needed a solution with a low total cost of ownership that could help her department meet the privacy and access requirements defined by the Health Information Portability and Accountability Act, commonly known as HIPAA. Additionally, the system needed to be flexible and able to be rolled out across the organization.

Solution

Information & Records Associates (IRA), an Authorized DocuWare Partner, implemented the solution and trained the users in only three weeks. Electronic DocuWare filing cabinets were set up based on how information needed to be retrieved with the mind set of the less indexing the better. The 15-person department shares scanning and indexing duties on a centrally located multi-function device. The staff spends as much time scanning as they would filing, but retrieval is where significant time savings are seen. Oaklawn contracted with IRA to scan the 115 boxes of past information and today everything from 2003 forward is stored in DocuWare.

Efficient workflow storage processes are now in place. Explanation of Benefit forms, which contain insurance payment information for multiple patients, can be between 1-1,000 pages long and are indexed by payer and payment date, not by individual patient names. Check copies are indexed the same way. Only prior authorization forms use more index fields and are stored by patient name, patient ID, insurance company name and dates of service. This method of simple indexing allows the staff to easily find needed information.

On the retrieval side, the staff uses DocuWare constantly in order to reference documents needed to answer questions related to EOB payment interpretation, secondary insurance claims, or to verify information from insurance cards or contracts. All this information can now be instantly accessed, faxed or e-mailed from the desktop, without getting up to hunt for one piece of paper.

The Task

- Move a department in-house without adding office space
- Comply with HIPAA regulations
- Improve document workflow
- Share information between departments

Appointed Modules

- DocuWare
- ACTIVE IMPORT
- AUTOINDEX
- CDMAKER
- CONTENT-FOLDER
- INTERNET-SERVER
- LINK
- RECOGNITION

The Benefits

- Gained control over Financial Services, thus improving cash flow
- Streamlined business processes and information access enterprise-wide
- Reduced legal exposure
- Improved patient satisfaction

"My staff absolutely loves DocuWare. I have not yet received a complaint about the system, in fact I think they would throw a major temper tantrum if I took it away from them," joked Beth.

Benefits in Detail

User Benefits

With DocuWare, the Patient Financial Services staff has the tool they need to easily accomplish their day-to-day tasks, decreasing workplace stress and improving productivity.

"I'm responsible for generating claims, getting them out the door, negotiating contracts and ensuring the collection of payments. DocuWare stores the documents that are tied to these processes and helps me and my staff accomplish our tasks," said Beth.

Department Benefits

One of the biggest benefits the department has seen is time savings resulting from fast retrieval. They can process more claims with DocuWare than a larger staff working with a manual paper-based system.

"I've worked with paper EOBs in the past and DocuWare prevents my staff from spending a lot of time retrieving documents. My staff never has to deal with running in circles to find the right document," said Beth.

DocuWare allows the department to meet HIPAA requirements for all patient related data by tracking who stored each document, the storage date, as well as who accessed each document and the access date. Document security is easily managed using assigned access rights based on document type and file cabinet.

The transition from an outsourced to in-house department went very smooth – thanks to the flexibility of DocuWare. During the transition, the outsource agency, located 90 miles away, was responsible for billing secondary insurance claims. With DocuWare in place it was easy to share EOB documents during the few months it took to consolidate all the billing into one office.

Corporate Benefits

Without an electronic document management solution, Oaklawn would not have been able to move Patient Financial Services, short of building additional office and storage space. DocuWare allowed the company to regain control over the Patient Financial Services process, while providing better customer service to its patients and their advocates, thus improving patient satisfaction.

Legal exposure has been reduced because Oaklawn is able to meet HIPAA and other internal and external compliance requirements.

Cash flow has improved since the department moved in-house. DocuWare provides optimum control of information and allows the staff to easily resolve disputed payment claims with patients and insurance companies.

The system is expanding throughout the organization and more and more efficiencies are being realized. For example, the HR department maintains a credentials electronic file cabinet that contains physician licenses, degrees and résumés. This information is often needed by the Patient Financial Services department for submission to insurance providers in order to obtain payment. Oaklawn is in the process of implementing the solution enterprise-wide among three different sites.

Beth said, "We at Oaklawn have a long term outlook in regards to DocuWare. For us, this system is not just about document storage, but about document workflow as well."

By streamlining business processes, Oaklawn's staff can focus on its vision of helping people "live in harmony with self, others and God, through healing and growth of the whole person."



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*Beth Arter,
Director of Patient Financial Services,
Oaklawn*

For more information
please visit our website
at www.docuware.com