Going Paperless

Benefits and Challenges
Implementation of Document Management and Workflow System
Who is Cory Hamma?

- CRGC IT Director
- Microsoft Certified IT Professional
- Horse Enthusiast
- Technology evangelist
Why are we reviewing these processes?

- New Geographic Challenges
- New Remote Workers
- Reduce toner and paper consumption
- Current Process is Labor Intensive
ROADMAP

Electronic (EMR) Process

Paperless Process

Current (Paper) Process
Customer Relationship Management

Clinic

Hospital

Physician
Customer Relationship Management

Clinic

Hospital

Physician
Customer Relationship Management

- Facility
  - Preference for receiving information
    - Fax vs Email, which contact
  - Main Fax #
    - Verified Date
  - Alternate Fax #
    - Verified Date
- Email
  - Verified Date
  - Alternate Email
    - Verified Date
Current System – Followback example
Benefits!

• No more re-sending failed faxes due to busy phone numbers
• Efficient re-sending requests to corrected recipient
• Quick and easy work re-distribution
• Reduced storage space
• Reduced Paper / Toner / Office Machine maintenance
What is ...

Document Management

- **Version History** – keep track of each version of each file
- **Attributes** – descriptive information for the document
- **Storage** – all documents are stored in a system automatically
- **Lifecycle** – automatic archiving / removal of documents
What is …

**Workflow**

- **Location Tracking** – who is assigned each document/case?
- **Approval** – users approve their version of a document
- **Queues** – documents/cases appear in user queues
- **Automated Tasks** – Zone OCR, merge documents, etc.
Why should I go paperless?

- Not already pulling data directly from EMR systems
- Monitor Productivity with real numbers and easy auditing
- Standardize Processes ensures consistent data
- Work Distribution
- Automated Tasks save time
What should I look for in a system?

- **Document Splitting** – multiple cases in a single document
- **OCR / Zone OCR** – descriptive information for the document
- **Flexible Workflow** – Not just signature / approval
- **Fax Integration** – if your facilities fax documents
- **Scanner Integration** – if you receive hardcopy
What else might I need?

- Secure messaging / file transfer system
- Cancer Reporting DMS that allows you to attach electronic documents (PDF)
- Print to Cancer Registry feature
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Thanks for attending!

It looks like you’re trying to automate followback. Maybe I can help?