



## PHARMACY MANAGEMENT GROUP

### Imaging and Workflow Drive LTC Pharmacy's Productivity and Growth

In 2003, Pharmacy Management Group (PMG) was poised to expand its Cleveland-area long-term care (LTC) pharmacy operations to include satellite offices in Columbus, OH (nearly 150 miles away) and Sharon, PA (about 90 miles away). Among the challenges associated with pursuing this opportunity to aggressively grow the business were staffing and managing paper flow between these sites. Adopting an electronic document management and workflow solution helped PMG overcome these potential barriers to deliver an even higher level of service to nearly as many long-term care patients as well as realize other operational benefits.

Dedicated to delivering first-class pharmaceutical care with superior service to nursing homes and assisted living facilities, PMG serves more 72 facilities with a total of more than 5,100 beds. PMG President David Coury estimates that his company provided prescriptions and managed non-medical orders for more than 10,000 patients in 2006. "Before we knew about OnBase, we knew that paper processes were inefficient," says Coury. "In addition, if a facility claimed a prescription hadn't been received, we didn't always have a quick way to prove that it had been filled. If we couldn't locate the appropriate documentation to prove delivery, we would have to send a new one at our expense."

Developed by Hyland Software, OnBase is a fully integrated enterprise content management (ECM) software suite with core capabilities in document imaging and management, COLD/ERM and automated workflow. PMG worked with Security MicroImaging, an OnBase Authorized Solution Provider specializing in paper-free pharmacy solutions, to design and implement not only the initial solution but ongoing enhancements that have maximized the level of productivity and efficiency.

### Better Triage with Fewer Employees Through Document Imaging

PMG customers submit medication orders, non-medication orders (such as dietary or physical therapy) and demographic information via fax. In the past, these faxes had to be physically distributed to the correct department. This process became even more time consuming when a customer fax included information for more than one department, such as a prescription order and a dietary order on the same sheet. In this case, the faxes would have to be photocopied in order to prevent bottlenecks.

Now the faxed documents, prioritized according to the number from which they originate, are captured by the fax server as electronic images, rather than being printed on paper. Based on the customer associated with the phone number, thousands of images a month are automatically routed to the appropriate processor at one of the three facilities. An OnBase Workflow solution allows the processor to view the image and send it to order entry, medical records, billing or any combination with the click of a button.

The images immediately appear in employees' work queues. An order entry clerk, for instance, opens the image and enters the information into PMG's pharmacy management application from Rescot Systems Group. While the images are unalterable, preserving their integrity, technicians can add "sticky notes" to them, alerting pharmacists of potential problems or documenting other actions taken. Unlike paper orders, the images can be magnified, increasing legibility of handwritten notes and eliminating many calls to the facility.

When the order has been entered, keywords used to index the document (e.g., patient name, prescription number, etc.) are assigned to the image, making it possible to search the OnBase repository for those values later to facilitate customer service and audits. Through an integration between OnBase and Rescot, the images can also be retrieved from relevant screens within the pharmacy management application, eliminating the need for employees to navigate between applications and learn new processes to get the documents they need.

#### AT A GLANCE

Eliminating paper-based processes allowed Pharmacy Management Group, a fast-growing long-term care pharmacy serving more than 5,100 beds, to increase productivity, raise service levels, facilitate creation of satellite offices and support risk mitigation and compliance requirements.

#### BENEFITS

- Reduces labor and materials costs associated with managing paper-based documents
- Speeds customer service response times
- Allows multiple locations to collaborate more effectively
- Provides management visibility into work volumes and flows
- Facilitates growth and development of multiple sites
- Eliminates potential costs due to lost documents

#### APPLICATIONS

- Order Entry
- Medical Records
- Billing
- Customer Service

#### ONBASE SOFTWARE

- Workflow
- E-Forms
- Application Enabler™
- COLD/ERM
- Production Document Imaging
- Document Import Processor
- Disconnected Scanning
- Web Server
- CD Authoring

#### COMPLEMENTARY PRODUCT INTEGRATIONS

- Eastman Kodak Corp. document scanners
- Rescot Systems Group pharmacy management software
- Security MicroImaging Bar Code Automation and Fax Import Automation modules

Electronic versions of the clinical warnings generated by Rescot are associated with the order once it is entered into the system. Prior to using OnBase, the clinical warnings had to be printed and passed on to the pharmacist for review along with the printed fax. Now the pharmacist can view the images of the order and the warnings to complete the verification process. Because these images are immediately available once the order has been entered, the pharmacist no longer has to wait for paper to arrive to complete the verification.

Once the order is filled, the Rescot software generates a bar-coded delivery ticket, which the courier delivering the order has signed at the customer facility. When the delivery ticket is returned to PMG, it is scanned using document scanning hardware from Eastman Kodak Corp., and a bar code recognition process developed by Security MicroImaging is used to “read” the prescription number encoded in the bar code.

OnBase uses the prescription number as a common thread to link the original order with the delivery ticket. This is useful in a number of customer service and auditing situations, including addressing the potential problem of having to replace prescriptions that were sent. For example, if a customer calls and says an item wasn’t received, the customer service representative can enter a value such as the resident number/name and move between the order and the delivery ticket with a mouse-click. Being able to access this information immediately eliminates the need to inconvenience a nurse who may be in the middle of a medication pass by having to call back after consulting a paper file.

Because PMG considers the ability to offer a higher level of service to be its competitive advantage, being able to increase service levels without incurring excessive labor costs is a major benefit of using OnBase. “For every 2,000 beds a pharmacy serves, it takes about one FTE [full-time employee] to staple and file incoming paper-based orders,” Coury notes. “An imaging and workflow solution could reduce the need for 1.5 FTEs for every 3,000 beds. In our case, we’ve freed customer service staff to actually provide customer service, resulting in a higher level of service despite rapid growth.”

When PMG implemented OnBase, it served about 1,800 beds. Today, a single internal customer service representative (there are numerous external representatives) manages the 5,100-bed operation. Employees previously assigned to sorting, stapling, filing and distributing faxes have been reassigned to order entry, allocating more resources for

customer service and providing more stimulating work for the employees. Not only is the work more stimulating, but the space previously devoted to file storage was converted to a fitness center for use by employees.

Document imaging has driven similar efficiency improvements in medical records and billing and may even set the stage for new and differentiating services. For example, PMG maintains medication administration records (MARs) that include non-medication orders, such as dietary or physical therapy records. While PMG currently provides these records to a facility on paper, they could potentially offer electronic MAR services using existing OnBase tools

### Less Paper Drives Faster Growth, Greater Accountability

“OnBase is especially valuable to a pharmacy with multiple locations,” Coury states. “When we opened new locations, we didn’t have to add staff in certain areas until the business could justify it. This allowed us to open the satellite offices faster than we otherwise would have and allows some functions to remain at the main office.” The Cleveland office, for example, provides medical records and billing for the Columbus location

Authorized employees at any location can view any documents within the OnBase repository. The Cleveland and Columbus facilities access OnBase via a direct connection to the PMG network. However, the quality and cost of connectivity available at the Pennsylvania office prompted the use of the OnBase Web Client at that facility. Employees at that site access OnBase via a secure Internet connection using a standard Web browser.

The ability to view information across locations has a number of advantages. From a high-level management perspective, a complete view of the volume and status of work provides visibility into operational status. During the process of bringing on the new sites, the staff in Cleveland can assist and train employees at the satellite offices. For instance, if one location falls behind in order entry, technicians at another location can complete the work while still making the order quickly available to the onsite pharmacist for verification. “We’re less vulnerable because no one site is totally dependent on itself,” says Coury.

OnBase also mitigates a number of other risks for PMG. The company can respond quickly to customer or regulatory audits, facilitating a positive review with less disruption. For instance, a comprehensive

customer record with an overview of the month and all clinical history is available simply by entering a few keywords. Despite the easy access to documents by authorized employees, HIPAA compliance is supported through audit trails, access reporting and the ability to assign/restrict user rights. The entire image repository is also automatically backed up on CDs to prevent data loss.

OnBase’s modular design and easy configurability provide fast-growing organizations like PMG with the agility to realize continuous improvements and keep both internal and customer costs low. PMG has requested a number of automated workflow enhancements that have been implemented by its service provider. “We’ve easily made major modifications and customizations around Medicare D and formulary management that have made us less dependent on the pharmacy software application,” Coury reports.

Unlike specialized niche solutions, OnBase can also be expanded across multiple departments in an enterprise. PMG is currently developing a solution for use in accounts receivable. Among the expected benefits is the ability to automatically produce collection letters based on the completion of an electronic form. OnBase’s ability to cost effectively respond to PMG’s future innovative services and business needs promises a ongoing return on investment as the LTC pharmacy continues to grow.