

Where there's a bill, there's a way

Automating workflow and accelerating collections with digital document management

Since 1983, JJ&R Medical Data Systems, Inc., (MDS) has provided billing and collection services to healthcare providers ranging from hospital emergency departments to urgent care centers. Working through two divisional offices in Rancho Cucamonga, CA, and Baton Rouge, LA, MDS bills more than 60,000 patient accounts monthly.

Processing the thousands of paper documents associated with these accounts, however, was limiting MDS's productivity. "We needed a system to provide three key features: security, accessibility and accountability," says Solutions Architect Matt Brown. "We also wanted to cut down on paper-related costs. We spent the better part of a decade looking for a system that could accomplish all these goals."

MDS first experimented with a Web-based document management system in an attempt to eliminate paper documents and streamline workflow. "It did a very good job of storing and retrieving documents, but that was about the extent of its usefulness," Brown says. "It proved difficult to administer. So we then built a second document management system ourselves, using Microsoft® SharePoint® as the foundation."

This second solution provided a clear demonstration of the benefits of an enterprise-quality system. "We could see the possibilities, such as ease of retrieval, improved business intelligence and the efficiencies of automating work processes," Brown explains. "However, SharePoint isn't a document management system, so we were asking it to do something it wasn't designed to handle."

This experiment, however, helped staff envision an ideal solution. "Our immediate goal was to store billing records electronically, but our eventual goal was and still is a completely paperless workflow," Brown says. "We needed to make sure that billing records were easily retrievable, that protected health information was secure and that we could account for all our documents, but we also needed a solution that was cost-effective and scalable."

Laserfiche® fulfilled all these requirements—and more. Thanks to its open architecture, Laserfiche can serve as the document management back-end for many line-of-business applications, including Med/FM™, the application MDS uses to manage billing and claims processing. With help from their Laserfiche reseller, JPI Data Resource, MDS integrated the two systems so that staff can instantly access Laserfiche documents from within Med/FM. "That was the system's number one selling point," Brown notes.

After MDS selected Laserfiche, things moved quickly. "Installation was completed in less than a day, and training took less than a week," Brown remembers. "We were able to initiate a completely paperless workflow for one of our clients by the week's end. Then we started bringing our other clients online."

Some clients still send MDS paper billing documents, which must be processed manually. Staff scan those documents, separated by bar-coded index sheets, into Laserfiche. The Quick Fields™ Bar Code Plug-In™ reads the bar codes and automatically indexes the scanned files.

"We simply attach the cover sheet to its corresponding billing record and Quick Fields does the rest," Brown says. "Quick Fields fills in all the necessary document metadata—such as the patient's name and identifying information—that is stored in the bar codes." When clients submit electronic documents, staff use the client's daily log to create empty documents in the Laserfiche repository that serve as place holders for corresponding billing documents. Staff then use Snapshot™ to convert the electronic information into unalterable TIFF files and import them into Laserfiche, where they are matched up with the empty documents created earlier.

To further automate work processes, Workflow™ routes documents among the various departments that create the billable record and generate the final claim. If any information is missing, Workflow automatically routes the record to the appropriate department for further follow-up.

While Laserfiche speeds up the entire collections process, it has specifically streamlined the process for submitting claims that require supporting documentation. "Before Laserfiche, there was a delay of several days, given that a staff member would have to physically locate the billing record, pull it and copy it," Brown says. "Now, we can send claims out the same day. Employees simply pull the account up in Med/FM and press a function key, which automatically generates a search in Laserfiche for the patient's billing record.

Brown doesn't hesitate in recommending Laserfiche to his peers. "I would unequivocally recommend it," he says. "After years of evaluating just about every document management system there is—and there are a lot—none of them comes close to matching the breadth of features Laserfiche provides.