



## SHARP HEALTHCARE

### ECM Solution Spans Financial Processes, Contracts and Admissions

The largest private employer in San Diego, Sharp HealthCare is an integrated, regional healthcare delivery system that includes four acute-care hospitals, three specialty hospitals, three medical groups and a health plan, as well as a full spectrum of other facilities and services. Serving a population of approximately 3 million in San Diego County, Sharp operates 1,867 beds, has approximately 2,600 physicians on medical staffs, 1,582 physicians in medical groups and more than 14,000 employees. The Sharp system represents \$1.2 billion in assets and \$1.7 billion in revenue.

Sharp HealthCare is not just known for the size of its operation, but also the quality. The commitment to quality has garnered numerous awards for patient care and safety, employee programs and technical expertise. Sharp Memorial Hospital was recently named to *Consumers Digest's* list of the Top 50 Exceptional U.S. Hospitals, and the entire Sharp system was a gold-level recipient in the California Awards for Performance Excellence, the state-level affiliate of the Malcolm Baldrige National Quality Award. Sharp has repeatedly been recognized as one of the best places to work by the *San Diego Business Journal* and recently took top honors in the San Diego Society for Human Resources Management's Workplace Excellence Award. For seven consecutive years, Sharp has also been on *Hospitals and Health Networks* magazine's list of the Top 100 Most Wired Hospitals.

Of all of these accolades, however, Sharp is proudest of its acknowledged leadership in patient satisfaction. For instance, bonuses and yearly increases are directly tied to results of patient satisfaction surveys randomly conducted by Press Ganey Associates, an independent vendor of satisfaction measurement and improvement services. "Patient satisfaction is the most important element of Sharp's mission to 'be the best place to receive care, best place to practice medicine and best place to work'," says Cathy Fuhrman, manager of the Document Imaging Group at Sharp.

To maintain high levels of service for patients and caregivers and increase operational efficiency

in several areas of the organization, Sharp began evaluating enterprise content management (ECM) solutions and vendors, including Aztec Imaging, an OnBase Authorized Solution Provider. "It was essential that the software conform to Sharp's security standard, which meant it had to support Microsoft Active Directory®," stresses Ms. Fuhrman. "We also needed something that would provide audit trails to keep us in compliance with HIPAA and could be easily maintained." After evaluating several options, Sharp chose Aztec and OnBase, Hyland Software Inc.'s integrated suite of ECM software solutions including core capabilities in document imaging and workflow, COLD/ERM and records management.

Hundreds of Sharp employees in the 4,200+ square-mile county currently use OnBase to streamline the patient admitting process, review and process HMO claims, process and pay invoices, manage contracts, fulfill prescriptions efficiently and more. Because OnBase is comprised of rapidly deployable modules, Sharp has been able to expand an initial investment to address multiple content management needs affecting business processes and patient care across the enterprise.

### Paperless Admitting Improves Patient Experience

Before implementing OnBase, a common complaint amongst patients had been the redundant collection of insurance cards, identification and other admissions documents. For instance, a patient admitted at a main inpatient desk and sent to Radiology a short time later for another procedure might be asked to produce the same documents and complete the same forms at both sites. By February 2007, Ms. Fuhrman anticipates that this inconvenience will be eliminated across all hospitals and satellites, more than 70 locations in all.

When a patient enters the hospital, the admissions clerk enters patient information into the GE Centricity Business (formerly known as IDX Flowcast) revenue cycle management application

#### AT A GLANCE

Sharp Healthcare, a \$1.7 billion regional healthcare system, has increased productivity, supported disaster recovery strategies and improved service by implementing an enterprise content management solution that spans business processes and patient care.

#### BENEFITS

- HMO claims adjuster productivity increased 150%
- Relevant documents are available to users throughout the system, reducing costs associated with call volumes and distribution
- Documents can be retrieved from directly within the line-of-business applications users are already familiar with
- Supports existing security procedures and HIPAA compliance
- Provides a unified platform for ongoing process improvements across the enterprise
- Eliminates redundant data collection at admission and improves patient experience
- Decreases revenue cycle by ensuring correct information is captured at admissions and providing tools for denials research
- Improves patient safety by ensuring perinatal orders are distributed when a patient presents
- Speeds fulfillment of inpatient pharmacy orders and reduces resources to file and research the orders

#### APPLICATIONS

- HMO Claims
- Accounts Payable
- Contracts
- Hospital Admitting
- Inpatient Pharmacy
- Perinatal Records

#### COMPLEMENTARY PRODUCT INTEGRATIONS

- GE Healthcare Centricity® Business (formerly IDX Flowcast™) revenue cycle management software
- Fujitsu® Computer Products of America document scanners
- Böwe Bell & Howell® document scanners
- Lawson Software, Inc. Lawson® Financials
- Datacap Inc. Taskmaster® forms processing software
- Wacom® Technology interactive pen displays
- IDX Systems Corp. Carecast® pharmacy management software

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as s/he always has. However, instead of leaving the patient to photocopy the ID and insurance cards, the clerk is prompted to scan these items using a Fujitsu Computer Products of America fi-5120C desktop document scanner. Generated through an integration between OnBase and Centricity Business, the OnBase Front Office Scanning interface indicates which items should be scanned and automatically applies the document type and keyword values used for indexing.

Replacing the paper documents that have to be signed as part of the admission packet, conditions of admission and other consent documents are presented to patients in either English or Spanish on an interactive pen display from Wacom Technology. This device allows patients to sign and initial appropriate areas of the documents using a special pen on an LCD screen. This system even provides the versatility for patients to cross out or add other notes to the document, which is saved in OnBase as a single, inalterable image. A copy is printed for the patient's personal records.

Despite admitted concerns about patient acceptance, Ms. Fuhrman says the paperless admissions process has been well received, and there have been no major objections. "On the first day of the pilot, an older gentleman refused to use the Wacom device," she recalls. "We feared the worst, but after some encouragement, he not only began using it but making recommendations for how the process could be even better. Of course, if a patient really doesn't want to use it, we will print a copy for them to sign, scan it and hand it back."

Through an OnBase Reverse API integration with AllScripts®, authorized users in Clinical Patient Services will also be able to view the insurance cards and driver's licenses. Documents can be accessed directly from the AllScripts EHR with the click of a button without compromising the security of the medical record, increasing convenience for patients without threatening their privacy.

At Sharp Mary Birch, one of only 17 freestanding women's hospitals in the nation, an additional element of patient safety has been added to the admission process for pregnant women. To ensure that a woman's perinatal records are available when she arrives for delivery, referring physicians fax them in to the hospital. Prior to using OnBase, these

records had to be manually tracked and retrieved for a population that doesn't generally arrive at a scheduled time.

To ensure that doctors immediately have all the information they need prior to a delivery, these faxes are now managed using OnBase Workflow. Automatically indexed based on the patient number in Centricity Business, the records are linked to that system, allowing staff to know when a referring physician record is present. The record can then be printed out and placed in the patient chart for review by the doctor on call.

Using OnBase in the admissions process improves the patient experience. By maintaining the supporting documentation electronically, patients may be able to avoid repetitive admissions processes when returning for follow up treatment or moving from one service area to another. At Sharp Mary Birch, eliminating the paper record chase also improves patient safety.

### **Document Imaging Slashes Revenue Cycle, Research Times**

Not only is paperless admitting more convenient for patients, it also has a positive impact on the revenue cycle. "Patient Financial Services is increasing revenue collected because patients are being registered correctly the first time, and the copies of the documents are immediately available to the users," notes Ms. Fuhrman. At Sharp Memorial Hospital, for instance, an offsite office had been set up to allow employees to work from Medical Records to pull records and copy cards needed to properly bill insurance carriers.

Having the electronic copies of supporting documents available in Patient Accounting can greatly reduce research time necessary to reconcile exceptions or denials. Supplementing access to admissions documents, Patient Accounting is scanning EOBs. Once scanned, they can be associated to specific patient record. Like the other documents, EOBs are made available directly from Centricity Business.

### **Increasing Productivity in Inpatient Pharmacy**

During a patient's stay in a Sharp facility, OnBase is used to speed the process for filling prescriptions and make workload balancing and auditing less

complex with little or no impact on clinical staff. As in many facilities, prescriptions are faxed from the nurse's stations on all patient floors. One of approximately 30 designated pharmacy sites gets the fax, and the order is entered in the pharmacy information system and then filed.

Using Captaris RightFax with integration to OnBase, the faxes sent by the nurses are converted to digital images and sent to appropriate workflow queues based on the location and whether the order has been designated as STAT or routine. Based on business rules, there are various workflow queues for each of the sites and satellites. The pharmacist or technician at that location sees the order and enters it into the Carecast pharmacy management software from IDX Systems Corp. These values are used to index the image, which is stored in OnBase, rather than manually filed. Should someone need to consult the original order, it can be quickly retrieved from relevant Carecast screens or via the intuitive OnBase search interface.

"The pharmacists are very happy with the results," Ms. Fuhrman comments. "They can run their own reports and know how much better they are doing at reducing turnaround times. OnBase sweeps the fax server every 60 seconds, so it's very quick and really promotes patient safety." The electronic work queues can also be accessed by pharmacists at other locations. If one area gets behind or closes at a certain time, pharmacists at other locations can complete the order, entirely invisible to the clinical staff.

Sharp's inpatient pharmacy solution highlights the scalability, cost-effectiveness and integration flexibility of OnBase. Leveraging the existing OnBase purchase used across the enterprise and the existing fax server, the only investment required to increase productivity and patient service in the inpatient pharmacy was a modest cost for workflow licenses and development and the installation of dual monitors for pharmacists.

### **Adjuster Productivity Increased by 150%**

Sharp HealthCare is also the third-party administrator for Sharp Health Plan and for several other HMOs that serve more than 440,000 enrollees. The amount of time and labor required to manually process paper claims within Managed Care Operations for Sharp HealthCare made that business unit the first candidate for an OnBase solution. Prior to using OnBase, clerks would receive the paper CMS 1500s (HCFAs) and enter the data into Sharp's patient financial system. Whenever someone needed to inquire about an invoice, a clerk would have to be dispatched to pull the document.

Now claims are sorted in the mailroom, and two full-time operators scan the documents using Böwe Bell & Howell 8080 document scanners. The forms are captured and verified using Taskmaster for Medical Claims from Datacap Inc., which is specifically designed to process CMS-1500s and UB-92s. Taskmaster validates fields against the Centricity Business system and brings in dictionary data such as specific doctor ID numbers.

These data fields are sent to Centricity Business via an existing EDI interface. A subset of these fields is also used as indexing values by which users can search for these claim images within the OnBase repository. However, users can also access the images from directly within Centricity screens that have been "image-enabled" using the OnBase Application Enabler module. Point-and-click configurable, Application Enabler allows users to access related documents simply by double clicking on an enabled field within the line-of-business applications they work in daily.

The claims processing solution has allowed Sharp to deal with a dramatic increase in claim volume without the need to increase staff. Prior to implementing forms processing and document imaging, individual adjusters were averaging 80 claims a day. Now the average is about 200. "We've also eliminated need for clerical support and no longer send four boxes of documents a week to Iron Mountain," adds Ms. Fuhrman.

### **Addressing Disaster Recovery Concerns**

The Contracts Department was also struggling with the complexity of managing paper documents. Not only was time spent filing and retrieving contracts, but research of any kind was very labor intensive. Then the California wildfires in 2003 underscored an even more critical need: disaster recovery. "The wildfires came within half a mile of that building," says Ms. Fuhrman. "If it had spread any further, we may have lost all of the contracts for the entire system. That's a pretty scary thought."

Completed contracts are scanned and undergo OCR (optical character recognition). This allows the contracts to be full-text indexed, making it possible to search every document of that type for a specific word or phrase anywhere in the document. Instead of pulling contracts from a paper file, researchers can retrieve them immediately from the OnBase retrieval window. If someone wanted to find all contracts related to a specific vendor, service, product or facility, s/he could put those words within the full-text retrieval window and view all relevant documents.

"This project has received rave reviews," says Ms. Fuhrman. "It has also been instrumental in achieving our second goal of disaster recovery." Sharp is able to create back-up copies of the electronic images and store them off-site, so the contracts are also safe from server or other failures.

### **Image-Enabling Lawson Reduces AP Labor**

The central Accounts Payable (AP) Department at Sharp uses OnBase Workflow in processing 15,000 invoices a month. After scanning, Workflow routes the invoices to the appropriate AP specialist based on Sharp's pre-defined business rules. Working with dual screens, clerks view the image of the invoice and key the data into Lawson Financials from Lawson Software. Application Enabler "scrapes" the indexing values from the Lawson screen.

In addition to streamlining invoice processing, the OnBase solution has also reduced demand on AP staff. Screens within both the portal and LID versions of Lawson have been image-enabled with Application Enabler, allowing users to retrieve relevant documents by clicking on the screens. "Call volume has been reduced dramatically," reports Ms. Fuhrman. "There are buyers, accountants and financial analysts throughout the system who used to request copies of invoices, which would have to be faxed to them. Now they can go into Lawson and pull them up themselves."

### **Interoperability Reduces IT Complexity, Expands Future Options**

"The trend used to be to buy best of breed, multi-vendor solutions," says Ms. Fuhrman. "Now the emphasis is on integration, interoperability and enterprise standards. We're consolidating some of our clinical systems as well as document management. We're replacing an old EDM [electronic document management] that was originally purchased to store records after discharge for disaster recovery with OnBase. It will cost less to convert it than to upgrade it and eliminate the need to support multiple systems."

OnBase's ability to integrate with virtually any application allows it to be adapted to nearly any environment. As new departments and processes are added, Sharp's Enterprise Application Enabler license will make it possible to get new integrations up quickly. Because it acts as an extension of existing applications, end user training is minimal. Specialized solutions can also be created using OnBase APIs. For instance, Sharp plans to link images of doctor's medical licenses and pictures of the physicians themselves to a CACTUS Software credentialing application.

Though easy-to-use, OnBase also offers sophisticated functionality that opens possibilities for innovative solutions that take patient service to new levels. For example, Sharp is exploring the feasibility of wireless registration in the Emergency Department to meet the unique needs of those patients. Mobile computers installed with Web client access to Front Office Scanning would allow access to OnBase through Citrix® technology.

OnBase has empowered Sharp to improve customer service by providing better access to business-critical documents without compromising security. "The best thing about this solution is that people can get what they need without asking someone in Claims or AP, based on their security levels," asserts Ms. Fuhrman. "Because it works with our Active Directory Groups, if you don't have rights to access a screen in Lawson, for instance, you can't get to the associated document in OnBase."

Despite its size, Sharp is focused on personal service as demonstrated by a commitment to exceeding patients' expectations in a caring, convenient, cost-effective and accessible manner as well as maintaining its low employee turnover and ranking as a positive workplace. The high level of user acceptance and ease of training make it likely that Sharp will be successful in continuing to realize productivity and efficiency gains from its OnBase solution. "The possibilities are endless," states Ms. Fuhrman.

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