

Client: Cypress Heart

Industry: Medical & Healthcare

Tracking the Circulation of Medical Transcriptions

Cardiology group Cypress Heart uses its EHR to store patient reports...and M-Files to track their development



Cypress Heart, a Wichita-based cardiology group of six specialists has already invested heavily in digital file management. According to Operations Supervisor Lisa Decker, “Cypress Heart started very early on with electronic medical records, adopting its first system six years ago. Our doctors really believe in using technology to move their business forward.”

The original system, GEMMS, is still in use today, handling the business end of the practice -- Cypress Heart’s billing, scheduling, claim generation, and account receivables – as well as the clinical side, capturing patient history, including textual transcriptions of their past visits and diagnoses.

But even in facilities with advanced digital systems like Cypress Heart, there are often gaps in medical office processes. Cypress Heart is another example of a medical clinic that has added on the flexible document management system M-Files to complement already existing electronic health records (EHR). While EHRs are good for sharing archived patient history, M-Files has functionality that many EHR systems lack: document history.

A question of who did what

“For every test or office visit we provide, the doctors are required to produce a transcript of that event. The problem was that although the GEMMS system helps to facilitate the creation and storage of the records, it does not track the development of these documents,” explains Decker. “In other words, there was nothing in the existing system that says last week Dr. Evans saw 10 patients on Tuesday so there should be 10 documents dictated, written, and signed.”

The clinic sees nearly 2,000 appointments every month, resulting in a massive volume of transcriptions, which change hands between clerical staff and physicians several times before completion. In a typical workflow, doctors would record their narrative after the appointment and pass the audio to a transcriptionist, who sends the text back to the specialist for review before mailing or faxing the report

to the referring general practice physician. Another two rounds continue after that, back to the doctor for an electronic signature, and back to the support staff to post the final permanently into GEMMS.

“In the course of the process, documents were getting lost and misplaced,” reports Decker. “One of our physicians was getting behind because he was not dictating on his visits in a timely manner. At one point, he was four months behind, and no one was aware of which documents -- or how many -- were outstanding. Just to determine what had been reviewed and what had not been reviewed was becoming extremely time consuming for our staff.”

Easily customizable tracking through M-Files meta-data

Decker decided to look for an IT solution which would track the progression of each document throughout all stages, so that at a glance, a manager could see what documents needed the physician’s attention, and which needed action by the support staff.

“When I was looking for a document control solution, I had two primary goals,” explains Decker. “One was to help facilitate the workflow of transcriptions. We needed something that would electronically flag the



status of the document, whether it was dictated by the physician, sent for review to the physician or approved by the physician. Secondly, we needed a way to track physicians that were not doing their dictation. So if you had 10 patients on Tuesday and we only get eight transcripts, we can easily identify the exact two patients that are missing.”

Decker found M-Files document management software through an Internet search. M-Files integrates directly into Microsoft Windows and saves files via database fields, rather than the tradition file name and file path. This results in precise and quickly retrievable files from any Windows application. Because managers can establish a required set of database fields for a particular recurring document, the M-Files method also works simply and effectively as a fully customizable document-tracking tool.

Decker wanted to set up the workflow so that each new appointment generates a single empty template in M-Files, which would hold all the information about the patients visit. All M-Files meta-data attributes would populate automatically when a user begins a new report: the doctor’s name, date of the appointment, patient name and date of birth. In addition, she wanted to add drop-down menus containing status tags as required fields. All the transcriptionists had to do to save a report was to choose from simple tags, like “waiting for physician review.” The physicians also used M-Files to review their documents online and change the status to either “approved” or “needs corrections.”

Managers could then, for example, query both “waiting for physician” and the physician name in M-Files, and get a list of outstanding reports for a particular doctor.

“M-Files allowed for this customization. Motive Systems was willing to work with us on a multi-document feature to pre-generate a template for every transcription document,” explains Decker, who says the installation of the M-Files document management software and Motive’s custom enhancements worked smoothly from the start.

Promoting the health of the office

The result of this simple improvement, she says, will have a positive effect on the quality of patient care, since the doctors are less apt to lapse more than a day or two on patient narratives.

“This helps keep the physician on the ball. We can report to him every week on the work he needs to do, so months and months don’t go by. Before, if he missed a patient last week, it may have taken us a month to figure it out. Now we send status reports every week so he will get the reports done a timely manner. This is better for the patient, because when the information is fresh in his mind, the dictation would be more accurate.”

Greater benefits of M-Files document history can be seen in the improved health of office workers.

“If a physician is three months behind on his dictation and it is a peak period, the staff has to catch up and this causes a lot of stress. The backlog impacts Billing and Medical Records -- just about everybody,” says Decker. “The custom workflow has been a success for us, since we don’t have to spend hours and hours tracking these items manually. Now we just go into M-files for a particular day and it shows us what is outstanding.”

About Cypress Heart

Each of Cypress Heart’s board-certified cardiologists specializes in specific aspects of cardiac-related disorders, allowing the Wichita, Kansas clinic to provide a wide range of diagnostic and treatment services. For more information, please visit: www.cypressheart.com.

For more information about M-Files and to try the flexible document management software free, please visit: www.m-files.com