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## Scanning for EMR/EHR Conversion

Tallgrass Orthopedic & Sports Medicine

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### Executive Summary

As more demands are placed on healthcare providers to offer exemplary patient care and maintain efficient practices, providers are turning to technology solutions such as EMR/EHR platforms to enable success on both accounts. With instant access to complete electronic records and the ability to prescribe, refer, chart, bill and more, practices are leveraging EMR technology to offer comprehensive patient care while maximizing operational efficiency and profitability.

Making the transition to EMR has many phases including the conversion of paper files into electronically formatted records which are then imported into the EMR software platform. Scanning for EMR conversion is typically a major undertaking and can be riddled with complications and unforeseen challenges for medical practices that choose to self-manage the full scanning process. While the scanning can be done in-house, most practices aren't able to accurately plan for the true costs and burden of temporary labor, risk of liability of a breach, and the countless project management hours required to properly oversee a scanning project the size of most EMR conversions.

Interestingly, after the considerable investment in the IT infrastructure and software licensing associated with implementing an EMR solution and migrating to a paperless office, outsourced scanning is typically a lesser line item expense by contrast. However, some practices, driven by good motives, try to "trim the fat" in scanning only to find that they have entered an arena that is well outside their suite of core competencies and prone to cause frustration and many long nights and weekends – or worse, such as a massive PHI leak due to either inexperienced or malicious scanning practices.

Tallgrass Orthopedic & Sports Medicine, the longest running orthopedic practice in Topeka, Kansas, made the decision to convert their practice to EMR and went completely paperless to streamline their operations, improve efficiency and ensure that their primary focus remained on

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patient care. They had the benefit of having a Practice Administrator who had personally experienced an EMR conversion along with the challenges and inefficiencies of a self-managed scanning project with his former practice. With the benefit of his lessons learned and a clear set of goals and requirements, Tallgrass set out to select a scanning vendor that could conform to their practice management style and deliver reliable, affordable scanning services.

Ultimately for their EMR conversion, Tallgrass decided to scan full records off-site with the qualified and dedicated team of experts at DataFile Technologies. DataFile's consultative approach coupled with their holistic view of the scanning project resulted in a tailored, cost-effective scanning solution and a positive overall experience for Tallgrass.

## Background

Tallgrass Orthopedic & Sports Medicine is a highly respected practice with nearly 60 years of patient care in Topeka, Kansas – the longest running orthopedic practice in the area. Tallgrass's team of 10 providers continually strives to provide the highest quality patient care and stay abreast of the latest methods, therapies and practice management approaches. To increase their operational efficiency and employ the most up-to-date technology available, Tallgrass decided to implement an EMR (Electronic Medical Records) platform and convert paper files to electronic records in the EMR transition.

An interesting background element in the Tallgrass EMR conversion was that their Practice Administrator, Brad Rea, was also a practicing Physician Assistant at the clinic. His unique perspective as both a provider and Practice Administrator served greatly in optimizing the EMR conversion from a workflow and process standpoint. His involvement and insights helped to ensure that the patients of Tallgrass would continue to receive the very best care and that the practice wouldn't miss a beat because of the EMR conversion and scanning endeavor.

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Another unique factor in the Tallgrass case was Rea's prior experience with a project of this nature: he had already managed an EMR conversion and paperless transition once before at another practice. This background gave Tallgrass an amazing first-hand view into a large-scale scanning project and the complexities of a successful EMR implementation. Rea's point of reference as the PA enabled the Tallgrass team to benefit from the "lessons learned" of his prior EMR scanning project and understand the trade-offs, nearly all positive, of choosing a vendor partner to take on the voluminous scanning effort versus managing and fulfilling the project in-house.

### Scanning Considerations

When Tallgrass chose to convert to EMR, the practice knew their decision meant undertaking a sizable scanning project encompassing decades' worth of paper records. By going paperless, they faced numerous decisions starting with what to scan: should they scan full records or should they include only partial files in the conversion and separately maintain and store paper files? Then Tallgrass needed to weigh their options for scanning fulfillment, choosing between self-managing the project and outsourcing the scanning to a third party. Also as part of this conversion and scanning process, Tallgrass faced the practical consideration of their physical space and whether the project should be done on-site or at an off-site scanning facility.

Beyond the overarching decisions of what to scan, who would scan, and where to scan – there was the question of how to scan. Tallgrass proactively set out to manage the many factors involved in their EMR conversion and address the "unknowns" that had to be considered regardless of their initial decisions. The many other considerations in their scanning project included the following:

- **What workflows could they implement** to expedite the scanning project and prevent disruptions and distractions to providers and patients?

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- **How would they assure** quality, accuracy and HIPAA compliance?
- **How could they avoid** misplaced records and “can’t find files” that would impact patient care and interrupt their day-to-day practice operations?
- **Were there any factors** related to their EMR of choice?
- **Should budget** alone drive their decisions?
- **What course of action** would have the least impact on their priority of excellent patient care?
- **Because their Practice Administrator** was also a provider, how would that affect the project in terms of his availability and perspectives on project management?

Tallgrass had the benefit of entering the EMR conversion process with the understanding that scanning paper records was an enormous task and had implications for the providers, the staff and most importantly, the patients. Thanks to Rea, their PA, who had been through a scanning project for EMR conversion in his previous practice, Tallgrass understood that successful scanning required a great deal more than simply buying scanning equipment and hiring temp labor. With Rea’s leadership, Tallgrass sourced a professional third party scanning service that would fulfill their scanning goals and requirements and address their concerns on workflow, HIPAA compliance, and uninterrupted patient care.

## The Full Record

A key question in scanning for EMR conversion is whether to scan the full record or portions of the patient file. Most agree there is no right or wrong answer to the question of what to scan and that the decision should be made on a case by case basis. How much of the record to scan depends on many factors including the type of specialty, the frequency of patient visits, the need for access to the various sections of the chart, the space or budget available for storage, and the preferences of the providers.

Tallgrass decided to scan full records as part of their EMR conversion for a few specific reasons, starting with quality of patient care. They chose to import the full record based on the providers' desire for instant access to the most complete patient information. Having the entire record electronically at their fingertips enabled Tallgrass to provide the highest level of care as well as maintain the greatest degree of efficiency. According to the Rea, their decision focused on the need to have quick access to complete record data in one place. "I can speak firsthand of the frustration of not having all the information in front of me when I need it with a patient," Rea offered. "Having that information available when you need it is important."

Secondly, Tallgrass decided that the scanning project would be onerous whether scanning full records or partial charts, and by including full charts, they would only have to go through the backlogged scanning process once. From his previous experience, Rea knew that figuring out what to scan and what not to scan can become a greater task than simply scanning the full record. The providers at Tallgrass felt if they were maintaining paper along with electronic records, there was more than one place for the record and thus the possibility that something could be overlooked and care could suffer.

Rea explained that having the full record in EMR served their desire for efficiency as well as for centralized, accurate information. "Because of that decision to scan the full record, we never have to worry about [patient health information] being in two places – so you don't have to have it pulled from two places," Rea commented.

Some practices have space and storage limitations which come into play in their decisions regarding records scanning for EMR conversion. Though Tallgrass had the storage to keep everything on-site, they decided with average page counts in a chart of less than 40 pages, scanning the full records was warranted to meet their stated goals. Furthermore, because of their orthopedic specialty, files were overwhelmingly made up of records from episodic visits rather than long-term maintenance care as one might

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see at a family practice and would serve their goal of greater accessibility if the full file was scanned.

While Rea is quick to note that the choice to scan full files is practice-dependent and may or may not be the “better” decision in the long run, for Tallgrass Rea believes scanning full files was the right way to go.

### **Choosing DataFile Technologies to Provide Scanning**

For Tallgrass, making the choice to outsource their scanning project was a matter of Rea’s experience... and serendipity. Five years earlier, Rea was forced to self-manage a scanning project for another practice in a more remote area because he had no other options. He brought in temporary workers to help with the scanning workload (which also increased risks of HIPPA violations internally); the practice purchased expensive scanning equipment to get the job done, and Rea personally dealt with the headaches of administering the project in-house. He decided that if he were ever to undergo an EMR conversion process again he would do it differently and seek out a professional scanning service. However, even now, more than five years after his first scanning experience, there are not an abundance of healthcare-specific scanning services that can handle the volume and complexity of this type scanning for an EMR conversion.

As it happened, DataFile’s Janine Akers held frequent seminars on release of information (ROI) topics as well as scanning and going paperless, and Rea was in the audience at one such event. Akers’ seminars include an open dialog on in-house versus outsourced fulfillment with the goal of educating practice administrators and providers rather than “selling” them. Her belief is that by presenting the facts, risks and realities of medical records topics, including the considerations unfamiliar to most practices, decision makers can become armed with enough information to choose the best course for their particular practice. As Tallgrass’s PA, Rea attended one of Akers’ Topeka-area educational sessions and kept DataFile in mind for when the time would come for his second go-round with an EMR conversion and paperless transition.

Fast forward some number of months, and Tallgrass was ready to make the switch to an EMR platform. Rea and Tallgrass knew of DataFile from the release of information fulfillment services, where DataFile can remotely access the practice EMR software to immediately respond to requests for medical records. In learning more about DataFile, Rea discovered DataFile offered scanning solutions and specialized in scanning for EMR conversion, so he made the call.

Along with DataFile, Tallgrass considered other vendors but ultimately settled on DataFile because of their experience with the NextGen EMR platform as well their expertise in optimizing scanning workflow. Another element Tallgrass appreciated was DataFile's consultative approach along with their holistic view on scanning, the EMR conversion process, and maintaining the utmost priority on patient care and provider access to records.

### Outcome & Benefits

Together, DataFile and Tallgrass are converting hundreds of thousands of patient record images into Tallgrass's NextGen EMR platform. Despite early challenges such as the awareness that they had misfilings in the paper world, Tallgrass confirmed that DataFile had the competency to help rectify their misfiling and launch their EMR with the most accurate, complete data. Rea shared, "We knew that we had misfiles to begin with, and this was an opportunity to correct that."

Another benefit Rea appreciated was DataFile's consultative process in arriving at tailored methodologies and workflows for Tallgrass. He pointed out, "It's not DataFile saying 'Hey, this is how it's gotta be.' They collaboratively find out challenges and create processes from the start to support the practice and their goals."

With the day-to-day realities of medical practice operations firmly in mind, DataFile knew Tallgrass's files couldn't simply be taken out of the office to be scanned without careful reporting, routing and accessibility. At all times, Tallgrass must know where the files are in case they need

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to be pulled for a patient visit or provider's reference. As such, DataFile worked closely with Tallgrass to establish safeguards for how to route and scan files that may need to be pulled at a moment's notice. In addition to establishing the workflow, DataFile made sure the Tallgrass staff was thoroughly trained on the procedures to reduce or eliminate lost charts or "can't finds" and keep the practice running smoothly.

Janine Akers, head of DataFile Technologies, said of the Tallgrass project, "We had to develop a process to address their specific practice management style. We created a workflow so that anyone in the organization at any time knew where a chart was. We felt very helpful in making their chart protocol efficient and error-proof."

Rea noted that the proactive and flexible style was one of DataFile's greatest strengths: "Their ability to analyze workflows and develop accountability for the project is outstanding."

As the project developed over the course of several months, both parties continued to refine their approach and learn new ways to make the project a success. According to Rea, DataFile has evolved in their processes to maximize quality and accessibility, and Tallgrass has found ways to be more efficient. "DataFile provides a turnkey solution for how you manage your paper records in the transition to electronic records," Rea said.

Ensuring sound processes and a smooth transition to EMR were important to Tallgrass, but Rea was also concerned with budget as well. The costs of managing a medical record in paper or electronic format can be substantial, and Tallgrass wanted to be sure that their scanning budget was well spent and would ultimately deliver the desired outcome. Rea noted that DataFile was sensitive to their budget concerns and helped Tallgrass see exactly what the costs were for the project and how to manage them. "I believe we did save by going with DataFile," Rea offered, and although the final numbers have yet to be tallied, Rea said Tallgrass qualitatively feels like this has been an overwhelmingly positive investment.

In the end, Tallgrass is confident their decision to go with DataFile for their EMR scanning project was the right choice. When asked about his experience with DataFile, Rea said, “From an operational efficiency standpoint, it’s been tremendous. DataFile’s project management and oversight gives you more time to train your staff on the EMR itself – rather than the minutiae of scanning.” He also noted that with DataFile, he was not forced to deal with the distraction of having to train temporary labor in scanning or utilization of the NextGen software platform, which is especially important given his role and responsibilities as a provider.

Rea appreciated that DataFile has been there for Tallgrass in every step of the process, from start to finish. “The planning was the most time intensive process, and Janine was very available and consultative – and once there was agreement – it was nice to hand DataFile the keys to run with it.”

### About DataFile Technologies’ Scanning Services

Truly, from start to finish, DataFile is there for clients with a scanning solution that delivers efficiency, cost-savings and peace of mind. We don’t just scan. We provide the thought leadership, reliability and expertise needed for a successful EMR/EHR conversion. From planning to optimized workflow to rock-solid execution, DataFile delivers.

Medical practices have options when it comes to scanning, and while a practice could take chances with hiring temps and buying the scanning equipment, those things are just the start of what a scanning project entails for a practice converting years of paper. The hidden considerations include understanding practice and paper workflow, routing and maintaining accurate images, considerable hours of project management, and the enormous risk of liability without proven quality assurance standards.

You’re not JUST hiring scanners when you select DataFile. You are engaging scanning experts who have years of experience scanning MILLIONS of records in a variety of scenarios. You are also transferring

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the record retention liability to a trusted Business Associate. We are experts in scanning for EMR conversion including specific knowledge in the most widely used EMR platforms, imaging workflow, time/motion efficiencies, HIPAA compliance considerations, destruction of records and more.

Learn how to save time, space and budget in your EMR conversion and scanning process with Datafile Technologies. Talk with us today or request a no-obligation cost analysis of your scanning project.

### **Hire an entire team for less than a part time employee.**

**About DataFile Technologies:** DataFile is your healthcare technology partner that offers strategic solutions to Free up your staff, Free up your time and Free up your space. We offer a superior medical record fulfillment process, a proven EMR implementation scanning service and a host of document management solutions.

