

Accelerate Forms Design and Maintenance Through Workflow Automation



The Challenges

Improve the Forms Review Process:

The healthcare system was looking to improve the forms review process for several reasons; such as:

- Delays in advancing the forms process based on forms not being readily accessible;
- Potential for errors based on manual processes, and
- Turnaround of new form requests based on poor, lost or inadequate communication.

Improve the Effectiveness of Professional Staff:

Manual form reviews are time consuming. They require a high degree of attention to detail in order to ensure regulatory and organizational requirements are met. In this case, the customer was seeking an automated process that could standardize the workflow, minimize risk and enhance the effectiveness of the hospital's staff.

Easy Handling of Regulatory and Legal Requests:

Regulatory inspections in the HIM area and litigation can require organizations to produce previous versions of forms, including documented reasons for any changes that were made to them. In these cases, staff are often required to reference data in manually updated spreadsheets and search for old paper forms in storage boxes – a highly labor intensive process.

Case In Point

Solution

EffectiveWorkflow

Results

- Automated the form design process
- Content and workflows launched across multiple locations
- Created digital, searchable archive of original versions of forms
- Automated process for placing requests to forms designers
- Decreased overall time necessary for forms review and approval

Benefits

- Improved forms review and turnaround time
- Enhanced process and audit trail of revision requests for regulatory reviews
- Enhanced ability to create and modify forms

Customer Description

- Comprehensive healthcare system located in the Southeast
- Multiple acute care facilities
- Full complement of health service affiliates
- Approximately 400 acute care beds
- More than 1,200 forms in their centralized forms library

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The Solution

SMARTworks® EffectiveWorkflow

EffectiveWorkflow was deployed for multiple locations – automating multiple forms design and maintenance processes. EffectiveWorkflow is a cloud-based software solution. Among its many features, it creates a single repository for all documents in an organization that require ongoing updates and modifications.

The Implementation

A team of Taylor Healthcare professionals worked directly with the customer during the implementation process. Together, we identified all critical workflows and forms that needed to be automated prior to installing the solution.

Multiple team members were involved in the discovery process, with key HIM sponsors driving the project along with Taylor Healthcare professionals. Training was provided remotely, with both organizations performing tests to ensure accuracy and a successful go-live.

The Results

EffectiveWorkflow has significantly improved the customer's forms management process. Today, the customer can even access, review and modify forms on mobile devices. As a result:

- Previous versions and associated notes can be retrieved easily through the forms content library.
- Form turnaround time is reduced through the use of automated alerts and the system's workflow capabilities.
- Requirements are automatically sent to form designers at a push of a button.

Best Practices

Virtualize the Forms Committee

EffectiveWorkflow offers a better, more efficient approach to content management. This technology:

- Accelerates forms design.
- Enhances communication among form committee members.
- Ensures standardization of content.
- Protects your brand.

Initiate Requests:

EffectiveWorkflow helps you manage existing forms and easily initiate the development of new forms. The end-to-end process streamlines management, design and accountability.

- Access an eForm and submit via the web.
- Jumpstart a pre-defined electronic workflow process.
- Route tasks and documents to the appropriate owner(s).
- Track progress and manage versions.

A Sustainable Content Delivery Process:

Manage the required workflow and policy for ongoing modifications of content and designs through EffectiveWorkflow – a healthcare technology solution with:

- **Predefined Users:** Establish roles and approval hierarchy. Maintain user groups and rosters.
- **Predefined Processes:** Define processes to be automated and seamlessly completed.
- **Workflow efficiency:** Email routing of tasks to all members.
- **Media Neutrality:** From printed brochures to electronic forms, manage all of your content regardless of the type of media.
- **Flexibility:** Add users, manage permissions and modify roles as necessary.