



Healthcare Network

Case Study

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Intelligent Capture Enables a Healthcare Network to Reduce Staff, Streamline Document Retrieval and Enhance Data Security

Healthcare reform has made improving operational efficiency all the rage in the healthcare industry.

One large healthcare network improved efficiency with an intelligent capture solution from Birmingham, AL-based ibml. The solution has enabled the network to reallocate staff, streamline document retrieval, and better safeguard sensitive provider information in its credentialing area.

The network provides care management for approximately 830,000 patients.

The Situation

The healthcare network receives claims representing between 1,000 pages and 20,000 pages per month.

Most of the Health Care Financial Administration (HCFA) forms that the healthcare network receives are outsourced to a third-party for processing. However, the network processes appeals documents from providers for claims or pre-authorization claims. The documents, which typically include medical records charts and can total 600 pages, were extremely labor-intensive.

Before deploying the ibml intelligent capture solution, the healthcare network manually sorted claims into batches of 25 submissions. A desktop scanner created front and rear images of each document in 150 dpi bi-tonal TIFF format. A document control number was then sprayed onto each document by the scanner's inkjet printer. Once batches were scanned, the images were routed downstream for data entry and indexing. An automated, template-based recognition process attempted to match certain data fields on each submission against a lookup file of member and provider information. If a match could not be completed, users attempted to locate the member and provider information on the image and searched through existing records to manually index the submission. After the necessary data elements were captured, an XML file was created and submitted to for reference and archival.

The healthcare network began investigating alternative capture solutions after learning that its legacy capture platform, and the scanner and operating system on which ran, were being sunset. The company recognized that operating a system with no support created the risk of significant downtime in the event of a system failure. The replacement solution proposed by the provider of the healthcare network's old solution was "expensive" and "overkill" based on the company's needs.

In addition to deploying a supported capture solution, the network hoped to: accelerate job setup and document preparation, improve real-time reporting of scanning and capture processes, streamline the re-scanning of single documents, capture metadata during scanning that could be used by downstream applications, and have the ability to view images of documents as they are created.

The Solution

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The healthcare network was especially impressed that it could set business rules for the data it wanted captured from each page, which would enable it to better process the wide range of documents that its various departments receive. ibml's ability to automatically classify document types also was a selling point.

The healthcare network initially implemented the ibml solution to process rejected submission letters and some HCFA/UB92 forms. The ibml capture solution includes ibml's ImageTracDS 1150 desktop production scanner and Capture Suite (CS) software, including Synergetics. CS centralizes the setup of document scanning and intelligent information capture. Synergetics, a component of CS, is an intelligent document recognition solution that automatically classifies documents, extracts and validates metadata, and exports information to downstream systems.

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Once submissions have been extracted from their envelopes, they are sorted into batches of singles (single-page submissions) and multiples (multi-page submissions). Barcoded patch sheets are inserted to designate the start of a batch and the start of a multi-page document. Batches then are scanned to create a front and rear 300 dpi bi-tonal TIFF image of each document. Each page is sprayed with a document control number by the scanner's inkjet printer. An image manipulation process then removes hole punches from images, corrects skewed borders, repairs dog-eared pages, removes the blank backside of images, and auto-orientates the document images to the correct position.

After the image manipulation process is complete, documents are electronically uploaded to ibml's Synergetics software where they are sent through various processes to assemble pages and automatically extract data elements required for indexing. Documents are automatically indexed based on patient or member identification number, patient or member name, date of birth, and street address. Extracted data is validated against a database of patient records. Records that cannot be automatically validated are presented to a user for review and manual processing. A free-form fuzzy search tool and matching algorithm present users with records with the highest confidence levels. Upon completion of all documents within a batch, Synergetics exports the information to an archive.

The healthcare network also uses the ImageTracDS 1150 desktop scanner to automatically count the number of pages in batches of HCFA forms that are sent to a third-party organization for processing.

Based on the success of the ibml solution in its claims operation, a few months later the healthcare network extended the solution to its credentialing operation. The company receives up to 3,000 pages per week in its credentialing area. The healthcare network unsuccessfully tried using a low-volume solution to scan its credentialing documents, but it required staff to insert separator sheets between different documents or manually key indexing information for each document. The ibml platform digitizes folders of credentialing documents, classifies different documents and document types, and extracts the key data from the documents required for indexing.

As part of this effort, the healthcare network leased an ultra-high-speed ImageTrac[®] scanner from ibml to digitize its back-file of approximately 400,000 credentialing documents. Other scanning solutions that the healthcare network evaluated were not cost effective, required significant data entry, or could not provide an interface that would handle the volumes required to digitize the back-file in a timely manner.



The ibml solution digitized the healthcare network's back-file in less than 30 days.

Moving forward, the healthcare network is planning to extend its ibml intelligent capture solution to its finance and administration department, and potentially to its membership, human resources, medical records and enrollment areas.

Benefits

ibml's intelligent capture solution provided the healthcare network with immediate benefits:

The ibml capture solution includes ibml's ImageTracDS 1150 desktop production scanner and Capture Suite (CS) software, including Synergetics. CS centralizes the setup of document scanning and intelligent information capture.

- **Labor savings:** The ibml solution enabled the network to avoid hiring more staff to support its growing volumes. In fact, some staff has been reallocated to value-added tasks.
- **Instant access to information:** The healthcare network previously stored some of its documents off-site at a third-party location. This required an employee to drive 50 miles roundtrip every week to retrieve documents for research requests. Authorized users now have instant access to archived document images and related data. Providing online access to information also reduces the burden on credentialing staff to research inquiries. Credentialing staff used to spend a lot of time photocopying documents and sending them to other staff. The intelligent capture solution also eliminates the chances of lost or misplaced documents.
- **Space savings:** By digitizing its back-file of credentialing documents, the healthcare network freed up a 30-foot by 15-foot storage room that was previously packed with "tall" filing cabinets stuffed with paper documents. Digitizing the back-file also eliminated the need for the healthcare network to move the filing cabinets as part of a planned move to a new facility.
- **Enhanced document security:** Each credentialing folder includes up to 60 documents, some of which contain the Social Security number, demographic information and other sensitive data on the physician, nurse practitioner or physician's assistant. The healthcare network used to manually separate these documents from credentialing files to safeguard private information. ibml's intelligent capture solution automatically identifies documents that are likely to contain sensitive information and restricts access to authorized users in credentialing.

Summary

Healthcare networks are focused on reducing costs, driving operational efficiencies, and digitizing paper. Deploying the ibml intelligent capture solution has enabled one healthcare network to address all of these objectives, while laying a solid foundation for future automation of document-driven business processes across the enterprise.