

# Inside Perspective

Helping you unleash the full power of MEDITECH

Wild

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## **Getting ready for MEDITECH Scanning and Archiving (SCA)**

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A few years ago, when MEDITECH announced that their Scanning and Archiving product (SCA) was in development, many of their customers put their plans for scanning and archiving on hold until they could see the product and go forward. Well, it's here now and a number of MEDITECH hospitals have started their implementation or are scheduled to start soon. A few are already live with the application.

The biggest selling feature? In a word, integration. As with all other products in the MEDITECH suite, SCA is completely integrated in the HCIS, creating a seamless workflow. There are, of course, other benefits that help to make this product a winner, including the ability to scan at point of contact or in Health Information Management (HIM), the ability to archive without purging, the electronic legal record, and the on-line coding tools.

### **The Key to a Successful SCA Deployment: Preparation**

It's no secret that the key to success in implementing SCA, as with any other application, is preparation. The first step is to identify why you're doing it. Are you facing space issues in HIM or on the system? Do you want to simply improve access to information, or go totally paperless? Are you reaching maximum number of days for data purge? The answers will help to define your organization's needs.

From there, you need to identify how you are operating today and envision where you want to be—then plan how to get there. The terms commonly used to describe this are "Scope Definition" and "Project Plan." The scope must be communicated to all parties involved. It creates a clear understanding of the end result, so there are no unwelcome surprises.

Another important success factor is getting user buy-in—especially from physicians—as there could be dramatic changes in the way they view information. Project leaders should:

- Find good advocates (which may even include the biggest former dissenter)
- Get them involved early in the decision process
- Anticipate obstacles
- Be persistent
- Educate, educate, educate

### **Implementation**

Once implementation begins, forms standardization is a vitally important step. You need to build a catalogue of all your forms and for each one of them determine:

- What is the source?
- Who uses the information?
- Is it going to be scanned?
- Is it going to be part of the electronic legal record or the EMR?
- Finally, is it going to be part of the demo recall?

Your plan should also take into account the liquidation of your old pre-printed forms. Careful consideration should be given to the placement of the identifier information, as it will become the standard across all departments. You'll also want to eliminate colored paper, as it does not scan

very well.

Of course, the workflows themselves have to be carefully examined in order to ensure a smooth implementation. Predetermine the implications your forms will have to your workflows. Identify how documents are used, what information is on them, and how they flow within the organization. This can be achieved through a series of structured interviews and working with a group of key people to analyze the responses. All the workflows, both before and after SCA, should be documented in flowcharts; these help identify critical decision points and what new policies and procedures will have to be put in place.

As with any application, SCA also has hardware and infrastructure considerations. The only real requirement for scanners is that they be TWAIN compliant, although it's important to remember that there are different scanners for different purposes and choose accordingly. Also, remember that the SCA application will only leverage some scanner capabilities, not necessarily all the bells and whistles a scanner manufacturer might tout during the sales process.

Storage requirements will vary—both at initial implementation and as data volumes grow. They depend heavily on the way the organization intends to use the SCA application. MEDITECH suggests that users estimate 5K per page of MEDITECH data to archive and 100K per scanned page to store. To calculate your storage needs, you should consider patient volumes for starters. How many inpatient, outpatient, and ER visits are there per year?

### **Project Management**

Finally, no implementation of this scope is likely to succeed without proper project management. For SCA, your Project Manager should have a strong HIM background. A comprehensive project plan must be in place, backed up by weekly status reports to the team, including an updated issues log with clear identification of who is responsible for the resolution and by when. Needless to say, no change in the organization should happen without the appropriate change control documentation in place.

### **JJWild's Scanning and Archiving Consulting Services**

JJWild has developed a suite of consulting services to help our customers address the Scanning and Archiving planning and implementation needs described above. The breadth of the considerations that go into a project like this is evident if you consider that the project plan we created for a previous client included over 175 tasks. It covered everything from the infrastructure and considerations surrounding the forms management software to the MEDITECH training sessions. Even we were initially surprised at the size of the plan, but in the end, it reflected the reality of how much is involved in this type of implementation.

Of course, you always have the option to handle the various components of the implementation within your own organization. However, if you are low on resources, or would like to bring in the expertise of someone who has done this before, JJWild can help with the following:

- Implementation/Optimization Strategy and Scope Definition
- Forms Standardization
- Workflow Redesign
- Project Management
- Full Implementation (which includes all of the above)

### **Summary**

The release of MEDITECH's Scanning and Archiving application has proven to be an exciting development for hospitals moving toward a paperless environment. For the first time, these organizations can electronically capture and store information needed to create and maintain complete, legal charts using a system that is fully integrated with their HCIS.

The key to a successful SCA implementation is preparation, followed closely by good planning

and careful execution. Be sure to identify and articulate key reasons for Scanning and Archiving adoption, determine and publicize the intended scope of the project, create and follow a detailed project plan designed to achieve that scope, engage physician advocates, standardize your forms, consider and define necessary workflow changes, and follow careful project management processes. And, please, let us at JJWild know if we can be of assistance.

If you have experiences with SCA that you would like to share, we'd love to hear from you. Or if you have any questions or would like to discuss an upcoming SCA implementation, we're always ready to help. Please contact us at [editor@jjwild.com](mailto:editor@jjwild.com).

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