Document Locator®

Case Study > Marlan ENT PLLC

> " *Once you start using Document Locator, it becomes even more valuable after you realize all the ways it can be used.* "
>
> **Dr. Robert Marlan, MD**

Medical practice saves frustration and time using Document Locator to manage billing and patient files

Otolaryngology, like many such words of Greek origin with a medical provenance, has an important meaning… and nothing at all to do with paper. So, in 2003 when Dr. Robert Marlan, MD, an Otolaryngologist physician, opened a new practice on the bustling southern shores of the Puget Sound in Washington state, he envisioned a paperless office.

Specializing in the branch of medicine and surgery for ear, nose, and throat, the practice of Otolaryngology, or ENT, is not unlike other branches of medicine when it comes to managing patient records, large quantities of billing files, and other important medical practice documents.

A Vision for a Paperless Practice

Dr. Marlan's vision for a truly paperless medical practice led him to be one of the earliest adopters of an Electronic Medical Records (EMR) system. However, he and his staff quickly found that an EMR system wasn't enough to clear away the paper—the patient and billing records were filling a room's worth of filing cabinets.

"At the time, my vision of paperless was for medical records. What I didn't have an appreciation for when we initially opened our office was the amount of paperwork generated and that has to be retained to run the business." After looking for a document management system that would fit the needs of his practice – a robust system that could work alongside an EMR system, several systems were identified that were far too unwieldy and complicated to use.

However, Document Locator proved the perfect fit. As enterprise level software, its design is robust, and has the ability to manage a wide variety of file types. It also didn't require an enormous investment of time to learn to use it— because it is designed to mimic Windows, it was extremely user friendly. It was scalable, built on SQL Server, which the practice was already using, and called for an installation and administration that could be handled in-house.

Saving hundreds of hours in EOB inquiries

From the start, Document Locator was deployed to automate billing, and Dr. Marlan and his staff were soon realizing its benefits in managing EOB's (Explanation of Benefits).

Customer: Marlan ENT PLLC
Industry: Healthcare

Critical Issue
Even with an EMR system in place, paper based patient and billing records were filling a room full of filing cabinets and causing delays and frustrations.

Solution
A document management system that works side-by-side with the EMR system, turning patient records and billing files into full text searchable, quick-to-retrieve digital information.

Result
Saving 200 - 300 employee hours each month in EOB retrieval alone, plus additional savings across many areas of the practice.

Software and Services
Document Locator
WebTools
ScanStation

ColumbiaSoft™

Whenever a patient visits their doctor, their insurance company mails an EOB, along with the bill, to both the practice and the patient. The EOB lays out what portion of the bill the insurance company is responsible for, and what the patient is responsible for. Whenever there is a question about billing, the EOB is consulted in order to answer the question.

Before using Document Locator, finding individual EOB's to answer questions was a problem of time and frustration. Finding each EOB was at least a ten minute process: a matter of taking down the relevant information over the phone from the patient, finding the time (either immediately, or making the time later) to go back to the filing cabinets, find the patient file, and then the specified EOB in the file, making another call to the patient, and then filing the paper back in the filing cabinet.

Now, when a patient calls with a billing question, it takes less than 45 seconds using Document Locator's search abilities to call up the relevant EOB to answer a patient's questions. With as many as 20 billing inquiries a day, the practice is saving between 200 and 300 hours of staff time every month, using Document Locator to retrieve EOB's.

A secure, central repository inspired solutions

Dr. Marlan and his staff quickly found that there were many other places in his office where Document Locator could bring order and efficiency. "Once you start using Document Locator, it becomes even more valuable after you realize all the ways it can be used," said Dr. Marlan.

Having all of the information in a central repository, working alongside the EMR system, makes finding and annotating patient files vastly easier and less time consuming. Now there is an organized,

secure space for patient files that don't fit in an EMR system, like images from CAT scans and MRI's, for example.

The practice also uses Document Locator to increase Business Intelligence; it's possible to analyze what vendors charge over time, and not only create a baseline for costs, but also create cost projections, and consider future impacts on the practice. "What is truly universal, no matter what business you're in, is that when you have easy access to information, you'll use it to your advantage."

Whether preparing monthly state tax records, or collating information for regularly submitted Labor & Industry reports, having the information immediately and securely available was more efficient than having them in paper files.

It even solved a problem that no one had really considered: multiple versions of office documents. As in most offices, documents, such as patient forms, would be edited on individual work stations, and then that revision would stay on the local machine, inaccessible (and often unknown) to others. The version level properties and the check in/check out protocols of Document Locator make it easy to be sure that everyone is using the most recent version of any document.

Instant access to information improves speed of care

Not only did using Document Locator ease access to information and free valuable time, it started serving a vital need. When patients are admitted to a hospital or an Emergency Room, the attending staff immediately call and ask for relevant patient files, so that they can treat their patient to the best of their abilities and knowledge. Dr. Marlan's staff can respond instantly, sending doctors and nurses valuable information immediately, so that

the attending physician has the ability to make better, faster decisions concerning that patient's health.

Solid support and new possibilities keep the whole practice satisfied

Over the last decade, the entire practice, from billing, to the front desk, to medical staff, have valued having Document Locator in their office. According to Dr. Marlan, "Document Locator increases efficiency as well as decreases frustration for people when they need access to information."

Having a competent and responsive customer support team on hand for the rare occasion when the staff hasn't been able to resolve an issue is key to their satisfaction with Document Locator. "Even with the best piece of software, you need to have good support there to assist, and ColumbiaSoft's support staff has always been right there for us."

Making a continuing investment in maintenance and support has not only been important for keeping a support team in reserve, but it also gives the practice ongoing potential for using the regular upgrades for Document Locator, which open up new possibilities, like using workflows, preview panes for quick viewing when searching files, and making mobile access available.

Ten years of dependable use of Document Locator has contributed to making Dr. Marlan's Otolaryngology practice faster and smarter, and he anticipates many more years to come.

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