



# Intake /Patient Registration Process

Jersey Rehab

An in-depth overview of the Patient Intake Process and our two phase process for implementation of a Paperless Solution™.

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## Overview

Jersey Rehab Pain Management is a practice in north Jersey that sees approximately 60 patients per day, 5 days per week. In order to improve patient satisfaction and office efficiency, Paperless Solutions™ shadowed employees to understand their process and provide a solution.

This document sums up the findings after observing the front desk intake and patient registration process. It also provides Paperless Solutions™ recommendations in order to eliminate the administrative task of scanning documents at the end of the day.

## Documents for Conversion



- Accident Insurance Info Form NJ
- Assignment of Benefits NJ
- Assignment of Benefits NJ- Spanish
- Attorney Release Form NJ
- Authorization and Request for Medical Records
- Chronic Opioid Agreement
- Consent for Cervical Media Branch Bock
- DME Release form NJ
- EMG NCV Certification Dr. Almentero
- HIPPA Privacy Act
- Medical Records Release Form NY PA PC
- No Fault Update
- Pre-Operative Checklist
- Waiver Form NJ
- Waiver Form NJ Spanish

## Company Background

IPT was established in 1990 by the management team of another successful document management company, Universal Data Systems & Micrographic Services, Inc. Over a period of almost twenty years (1970-1989), that organization successfully grew to achieve over 30 million dollars in annual sales, and had over 500 employees working three shifts, 24X7, 365 day a year.

In 1990, key managers from the original organization had the foresight and desire to take advantage of new technologies that were becoming available; technologies that would drastically change the direction of document management services being provided. Hence, the birth of IPT!

IPT has since evolved to become one of the premier 'document management service providers' in the New York, tri-state area.

It's happened again, IPT spawned another company.....*Paperless Solutions LLC* to meet the demands of today's tech savvy consumers. Today, people are not just concerned about capturing their company's data for archival needs, today clients want to have the ability to data mine and go paperless from the start. Many organizations today are faced with having to capture huge amounts of data in a short amount of time, conventional processes and methods are no longer acceptable to complete a high volume document scanning process, straight line processing is a level of scanning that not many organizations can afford, Paperless Solutions LLC utilizes the Straight Through process method to push almost 500 per minute per scanner, coupled with OCR, advanced Q.C. processes built into the workflow ensures fast and ACCURATE data is collected and output and any format needed..... It's a new business climate and new technologies drive this organization.

### *Companies don't succeed...people do!*

Today, the teachings and experiences of yesterday can be seen within every hall, office and operational process at Paperless Solutions.

Both Paperless Solutions LLC. & IPT continues to strive to develop the services we offer by utilizing state-of-the-art technology and best practices. Our no nonsense approach to excellence through standards continues to pave the way for IPT to be an industry leader, with quality and standards well above that of other service bureau providers - consequently placing us at the head of the pack - as *workflow, imaging and record management experts.*

## Current Paper based Intake Process

1. Patient calls into the office to schedule an appointment
2. They speak to the intake staff dedicated to setting up their appointment and collecting patient information
3. Information is entered into Cerner (existing document management system)
  - a. Intake staff is not always able to gather all information
4. The day before the patient is scheduled for their appointment the front desk staff **prints to paper** the *Encounter Form* from Cerner and attaches the *Routing Sheet* in preparation for creating the patient package.
  - a. NOTE: If the information is not available in Cerner the patient must fill out the *Patient Intake and Registration* form upon arrival.
5. Day before appointment, for a new consult the following forms are attached to their printed documents from Cerner
  - a. *Patient Intake and Registration*
  - b. *No Fault Update*
  - c. *Medical Health Screening Form*
  - d. *Waiver*
  - e. *Assignment of Benefits*
  - f. *Authorization and Request for Medical Records*
  - g. *Chronic Opioid Therapy Agreement (Pain Management) 2 page document*
  - h. *HIPPA Privacy Act*
  - i. *Records/ Film Release Form*
  - j. *No Show Policy*
6. Day before appointment for an existing patient, the following forms are attached to their printed documents
  - a. *Assignment of Benefits*
  - b. *Application for Benefits – Personal Injury Protection*
    - i. NOTE: If documents have not been scanned from previous appointments, then the patient must also complete the *Patient Intake and Registration Form*. This is repeated until the patient package is scanned and saved to Cerner so that the information can be retrieved.
7. The day of the appointment, if the patient arrives, the package (minus the *Encounter Form* and *Routing Sheet*) is handed to the patient for them to complete and sign in the waiting room.
8. A black and white copy of the patient's driver's license and insurance card is photocopied (both sides). THE COPIES MUST BE LEGIBLE.
9. If a patient does not speak English the staff must sit with the patient and translate all forms into Spanish.
10. Once the packet is completed by the patient it is returned to the front desk staff who then attaches the *Encounter Form*, the *Routing Sheet* and the *Patient Package* and places it in cue for the doctor to see the patient.
  - a. NOTE: Patients arrive approximately 1 hour early in order to complete the paper work.
11. The patient is seen by the doctor who typically will review the *Medical History Sheet* (for new consults).

12. If a patient requires an EMG or injection, they will sign the consent form in the Exam room. There is a unique *EMG/NCV Patient Certification* form based on examining doctor.
13. The doctor completes his notes in Cerner inclusive of follow up appointments, medications needed, additional testing.
14. The doctor then completes the *Routing Sheet* for the check-out staff to schedule any necessary appointments the patient requires.
15. The *Encounter form* is then routed to the billing department.
16. The *Routing Sheet* is routed to the back office to be scanned by date of service. Once it is scanned the paper is discarded and electronic file is stored for 3 months in a network folder.
17. The *patient package* is then placed in cue to be scanned and uploaded into Cerner.
18. The *patient package* is sorted based on document type.
19. It is then scanned in batches to a folder on the network
20. The documents are then copied from the network to a local folder (working of the server slows down the process due to the amount of data being transmitted).
21. One file in the local folder is opened to find the patient's name and the type of document(s).
22. In Cerner, search for the Patient (making sure the selected patient is the active file; sometimes there are duplicates of the patient records based on date of service).
23. Import the document by selecting the type of document and in the subject line adding a brief description of the document being uploaded.
24. Papers are then discarded and kept electronically for 7 years.

This is a general overview of the process and the routing of the Patient Intake Forms. It does not cover all scenarios such as Auto Accident Claims, etc.

## *Paperless Solution™*

Upon evaluation of the existing process, Paperless Solutions™ has devised a two phase implementation in which Jersey Rehab eliminate a significant amount of physical paper, redundancies and also improve patient intake process for patient as well as the office staff.

The proposed solutions includes the following:

- 1 Dynamic form (in English and Spanish) which will simulate the gathering of documents from the various folders the front desk staff needs to gather before an appointment.
- The staff will check the documents they require by selecting a check box on the cover page of the electronic form. This will make only the pertinent documents available and others hidden.
- The form fields will be consolidated so that the patient does not have to fill in the same information multiple times.
- Signature fields will be added where necessary and captured by the Topaz™ Signature Pad at the front desk or in the exam rooms
- The date will be auto-populated when the document is opened
- Patient name and date will appear on all pages of the document (entered only once).
- The document will be saved as the patient last name, first name and date of birth in the directory of choice.
- Driver's license and insurance cards will be scanned in duplex color by the front desk operator eliminating the need for black and white photocopies.

The above solution will be rolled out in two phases

### Phase 1

Phase 1 will include the dynamic form and consent functionality to eliminate approximately 60% of the paper work currently being generated. The Topaz™ signature pads will be installed at the front desk and in the exam rooms to capture signatures for consent forms. The color scanner will be installed at the front desk for the scanning of driver's license and insurance cards.

### Phase 2

Phase 2 will build upon phase 1 and suggest the addition of 5 work stations to be integrated into the front waiting room where patients will then fill out their documents on the workstation and have it saved to a secure location on the server. Phase 2 will also include additional Topaz Signature Pads at these work stations which will be signed by the patient at the time of filling out of the registration documents.

### Time Analysis of current vs proposed solutions

Process	Elapsed Time (mins)	Paperless Solution™	
		Phase 1	Phase 2
Front Desk Process (per 1 Patient)			
Collect Patient information when calling in for appointment and enter into Cerner	30	15	15
Gather documents in preparation for the patient registration	30	5	5
Patient fills out registration package	60	45	15
Signs Consent Forms		2	2
Copy of driver's license and insurance card	10	2	2
If patient does not speak Spanish (translate documents while sitting with Patient)	45	0	0
Exam Room (per 1 Patient)			
EMG or Injection Consent required	15	5	5
<b>Subtotal per 1 Patient</b>	<b>3.2 hrs</b>	<b>1.23 hrs</b>	<b>0.73hrs (44mins)</b>
<b>Subtotal Per 60 Patients</b>	<b>190 hrs</b>	<b>74 hrs</b>	<b>44 hrs</b>
Backroom per daily load (60 Patients Average)			
Patient Package Sorted	60	60	0
Scanned in batch to the server	45	15	0
Copied to a local workstation	5	5	0
Imported to Cerner	180	30	30
<b>Elapsed Time per day (60 Patients)</b>	<b>4.8hrs</b>	<b>1.8hrs</b>	<b>0.5hrs</b>