Managing Records between the EDMS and EHR: Monitoring, Evaluating, and Redesigning Workflows

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Every organization approaches the transition to an electronic health record (EHR) differently, and completing the endeavor successfully hinges on multiple factors that include evaluating the organization's existing IT systems and planning for those components to become fully integrated.

EHR bridge technologies such as an electronic document management system (EDMS) can help organizations fill in gaps where EHR components are missing. They can also help capture paper still generated within the facility or received from outside the facility and bring it into the EHR.

Electronic document management systems capture, index, and allow for viewing and retrieving information. They also include workflow technology to ensure that all actions are carried out in the correct sequence, within a certain time period, and recognized as a completed task. The documents tied to the tasks can be assigned, routed, activated, and managed through these rules and directed to a staff member for disposition.

Organizations that implement these systems as part of their EHR transformation will need to redesign, enhance, or change their information workflows. Doing so will help organizations achieve the goal of a complete record in a fully integrated EHR environment.

Workflow Approaches Vary

Organizations implementing an EDMS must decide where chart completion will occur and where finalized documents will reside. Many reasons and factors play into the ultimate decisions.

If the majority of a facility's documentation resides in an EHR with a robust workflow, the organization may decide to capture and index documents in a document imaging system with an upload into the EHR where the workflow is used to complete the record. On the other hand, if the majority of documentation is interfaced and completed in the EDMS, the facility may decide to use the EDMS to capture, index, complete, and store the record.

Whatever the circumstances, it is important to identify how documents are flowing through the system to completion.

Many EDMSs include a standard workflow, but some may need customization based on an organization's needs. Creating a visual diagram of each workflow is a great starting place to identify all the actions necessary for a solid workflow. As part of the project deliverable, HIM professionals should also work closely with the vendor and IT staff to develop and test workflows before implementation.

Workflows have touch points in many different departments throughout the organization, so communication and project management is important.

Challenges within the Workflow Process

Organizations must monitor and evaluate their EDMS workflows and make adjustments, especially when there is a change in how a document moves through the system. A change in the point of capture or in the document itself can alter a workflow.

Take for example, a scenario where documents are managed in the EDMS. During the EHR transition, signed paper medication administration records are scanned into the EDMS, which requires an organization change its workflow. However, this workflow changes again when the capture of medication administration records no longer takes place on paper.

When capture and signature is performed electronically in the EHR, the original workflow changes and HIM may need to create a workaround, unless the decision is made to interface or use integration tools to link the records between the EDMS and the EHR. Integration tools between the EDMS and the EHR not only potentially decrease the amount of workflow changes, they also enhance the clinician's experience.

"Designing and sending pointers to the EHR's clinical repository gives the clinician a complete view of the record for clinical care and operational purposes," according to Denise Dunyak, MS, RHIA, marketing manager for Siemens. "The technology allows the clinician to seamlessly open and view documents stored in the document management system by only logging in one time."

Timing is everything, and turnaround times and bottlenecks in document management can make or break workflow sequencing. In organizations where scanning is performed in a centralized location and turnaround times are not met, it is likely that the documents will not be processed and routed through the workflow according to predetermined workflow rules. For example, if birth confirmations are not scanned within 24 hours of the date of birth and the task does not populate the worklist in time for staff to process the request, it could create a delay in obtaining healthcare benefits for the child.

It is important to monitor workflows on a regular basis to ensure documents are moving through the system as designed.

Workflow Defined

Workflow refers to the sequence of tasks that need to be performed within a process.

Workflow technology helps to organize, automate, and improve processes by dividing them into component tasks, specifying who performs each task, identifying the business rule for performing the tasks, describing the potential outputs, and indicating who performs the next step in the process.

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