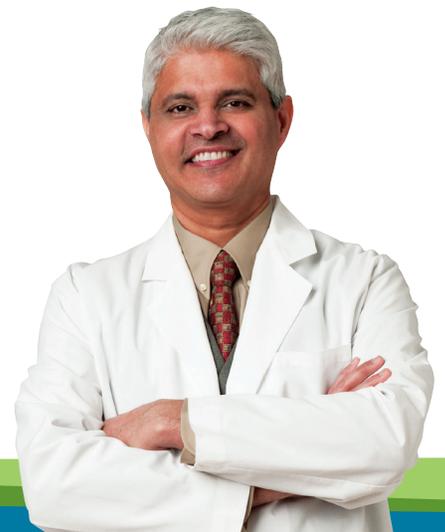


Health system cuts processing time in Procurement by 85 percent, saves 80 hours in HR

“Getting a requisition approved used to take three weeks, sometimes longer. Now, we complete most requests in only three days...Most importantly, MetroHealth is sure everyone followed the right procedures and can prove it with audit trails.”

– Cathy Kowalski, Materials Management Systems Specialist
The MetroHealth System

OnBase
a Hyland Software solution



The Challenges

- Two offices two miles apart made it hard to share information
- Employees could go outside defined processes too easily
- Documents weren't connected to the Lawson™ ERP and Epic® EMR

The Results

- Cuts down requisition approvals from three weeks to three days
- Ensures defined rules and procedures are followed
- Saves HR 80 hours per month just in filing

The Customer

Founded in 1837, The MetroHealth System (MetroHealth) is a comprehensive academic healthcare system which serves as the safety net public hospital for Northeast Ohio. MetroHealth has 731 beds and the health system includes a major medical center, a rehabilitation hospital, two long-term care/skilled nursing centers, an outpatient surgery center and a network of community-based healthcare centers.

The Challenges

Even with several enterprise applications in place, MetroHealth still had file folders and paper processes slowing work down across the health system. MetroHealth needed to integrate its paper into these systems, including the Epic EMR and Lawson ERP applications, to increase access, security and efficiency.

In addition, both Accounts Payable (AP) and Human Resources (HR) have offices in two different locations that are two miles apart. If a file was needed in one office but was stored in the other, getting it wasn't easy. Staff either had to wait for interoffice mail or drive to go get it. Plus, processes in AP and HR weren't always uniform or completed according to written rules.

The Journey

MetroHealth decided to eliminate paper and automate processes with a document management system. After a request for proposal (RFP) process that included 20 vendors, MetroHealth selected the OnBase enterprise content management (ECM) suite. The health system chose OnBase because it fit the needs of both administrative and clinical departments. It would eliminate the paper that was slowing MetroHealth down and integrate documents with software applications system-wide.

The Solution

Whether it's a physician looking for an Emergency Department chart, an AP clerk who needs an invoice or an HR employee looking up pay histories, users at MetroHealth have exactly what they need the moment they need it with OnBase. Departments scan in paper documents to convert them to electronic files in OnBase. These documents are then integrated into MetroHealth's Lawson ERP and Epic EMR. Instead of hunting down the physical paper document, users need only perform a simple keystroke to open up the documents they need.

AP resolves vendor dispute in an instant

The AP Department receives around 8,000 invoices per month and managing them on paper between the two offices made it difficult to share information and process them quickly. Now, they scan anything related to a purchase order (PO) directly into OnBase—from invoices to packing slips and bills of lading. After scanning the document, AP clerks enter the invoice data into Lawson with the OnBase image on a second screen. Once complete, OnBase pulls the data from Lawson and indexes the invoice into the system. That way, there's no redundant data entry and data is sure to match. Authorized users at both offices have access to the same documents in OnBase no matter when they need it with just a click in Lawson.

MetroHealth, like most organizations, sets certain thresholds to make sure that management is aware of and approves larger purchases. When an invoice meets MetroHealth's thresholds, OnBase makes sure it follows the right business rules and automatically sends it through appropriate reviews. For example, any amount over \$50,000 needs two signatures and must be approved by the Treasurer. With an automated workflow and complete audit trail, this process is sure to be followed.

With information at their fingertips, staff can also resolve exceptions and disputes right away. "When a vendor calls with a dispute, AP easily addresses it. We just bring up the documentation related to the PO or invoice, and we resolve the dispute immediately – without searching through paper files or callbacks," says Shirley Fisher, AP Manager at MetroHealth.

Procurement approvals cut from three weeks to three days

Before OnBase, purchase requisitions were just paper forms. By the time they came to the Materials Management Department (which manages medical equipment, furniture, etc.), they were often hard to read, incorrectly or incompletely filled out, and covered in notes. Even worse, it was hard for requestors to go through the right approvals, putting MetroHealth at risk for making purchases that management didn't approve.

MetroHealth converted the paper forms into electronic forms (e-forms), creating consistency throughout the procurement process. "We have a completely paperless procurement process. From start to finish, there's no paper involved at any point," says Frank Blumenthaler, Information Services Manager at MetroHealth.

Employees fill out the e-form on MetroHealth's intranet, making it easy for anyone in the health system to get to it. With features like drop-down boxes, required fields and directions right on the form, the forms are easy to read and filled out correctly.

The requests enter into an OnBase Workflow, where they are absolutely certain to go through all of the right approvals and follow written procedures. As the form moves through the process, OnBase sends notifications of status changes to requestors. Or, they can check the status on the intranet. Once approved, OnBase sends the data to Lawson in the RQ500 format. Lawson creates the PO, sends the PO number to OnBase, which then e-mails the number to the requestor.

"Getting a requisition approved used to take three weeks, sometimes longer. Now, we complete most requests in only three days. The process is easier on requestors, approvers and Materials Management. Most importantly, MetroHealth is sure everyone followed the right procedures and can prove it with audit trails," says Cathy Kowalski, Materials Management Systems Specialist at MetroHealth.

HR takes back 80 hours per month with paperless employee files

HR was spending 80 hours per month just for filing. In addition, sending the documents back and forth between locations opened them up to risk of loss or damage. It delayed research for salary histories, pay equities, job histories and other inquiries. Keeping track of 105 paper forms wasn't easy, either.

With OnBase, MetroHealth has created a virtually paperless employee file. (All that remains on paper are a few tax and government documents that MetroHealth is required by law to keep as paper.) HR has eliminated 20 filing cabinets that held more than 9,000 personnel files, freeing up space for better use.



“OnBase lets HR free up 80 hours per month to do something other than filing, so our employees can get more work done in less time. We save half a day with a click of a button.”

– Dennis Murray, Director of Compensation,
The MetroHealth System

To organize each employee’s file and make adoption easier, MetroHealth uses OnBase Foldering. Foldering mimics the look of traditional paper folders with 14 color-coded tabs in each file. OnBase automatically categorizes forms and documents in each tab as files arrive so they are easy to find. If a file comes in but there’s no folder yet, OnBase automatically creates it. Or, if an employee folder is incomplete, HR staff members can tell at a glance with missing documents shown in red.

MetroHealth has also automated employee change requests. Now, HR scans in change forms and OnBase automatically sends them to other staff who need to know about the change, such as Payroll or Benefits. A similar process lets HR scan in new hires and notify others of the addition. “Manually entering and sending employee changes used to take up to half a day; now, it takes only a few minutes,” says Dennis Murray, Director of Compensation at MetroHealth.

Improves patient care and reduces administrative costs system-wide

Beyond AP and HR, MetroHealth uses OnBase throughout the health system. The Medical Records Department scans in documents (e.g. Emergency Department and Life Flight charts, advance directives, etc.), and physicians open them up through a link in the patient’s Epic screen. This way, they have a more complete medical history.

In addition, more than 65 inpatient and outpatient sites use OnBase to collect patient documents at registration. Registration staff members enter patient data and OnBase automatically prompts them to scan documents such as consent forms, identification or insurance cards. The documents are immediately available throughout MetroHealth. That way, if a patient presents somewhere else in the system, they don’t have to provide the same information again. In addition, the documents can be used later on in the Patient Financial Services Department to speed the revenue cycle.

Why OnBase?

From having more resources to resolve exceptions and focus on employee retention to ten more minutes with a patient, OnBase creates more time for MetroHealth. Physicians, nurses and staff focus on the jobs they want to be doing – instead of searching and routing paper.

time to make a difference.

Get more information out of existing business applications. Reduce, even eliminate, wasteful, redundant tasks. Now you can spend your time on the things that really matter. That’s effective document and process management.

That’s the OnBase difference.

Learn more at Hyland.com/Healthcare

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