



## CASE STUDY

# Arizona Medical Clinic Heals Record Keeping Woes with Captaris Alchemy

*"It certainly has made my job easier!" —Medicare review analyst, Arizona Medical Clinic*

Industry	Healthcare provider
Challenge	Keeping track of patient records, HIPAA compliance
Solution	Alchemy Document Management solution
Results	Saved \$15K in wages; cut records retrieval costs by 73 percent; reclaimed 500 square feet of office space

## BACKGROUND

Arizona Medical Clinic (AMC) is a multi-specialty group practice located in the northwest valley of the Phoenix metropolitan region. Its five locations, with more than 80 physicians, have been serving the Sun Cities and surrounding communities for 30 years. Medical services include the areas of cardiology, geriatrics, gastroenterology, orthopedics, neurology, psychiatry, urology and more than a dozen other specialties.

## THE CHALLENGE

AMC had an immense task keeping track of and managing its records for patients, physicians, offices and services. The centralized business office housed a file room for charge tickets, insurance explanation of benefits, patient information forms, referrals and other paperwork, but accessing that information was cumbersome. For example, if a physician wanted a copy of a charge ticket, an employee had to dig through boxes and folders of files in order to find it. Mailing claim forms also caused the clinic problems, as many patients had a second insurance company that the clinic needed to bill. Clinic employees were required to manually pull all the secondary Explanation of Benefits (EOBs) out of boxes and attach them to the mailings. Additionally, the 30' x 30' file room was too small to hold more than six months of records, which required older documents to be sent to another storage area—accessing these records incurred a trip charge, as well as consumed large amounts of employee time and resources.

Even if employees knew where to look, locating desired documents and records was difficult, as the clinic filed different documents under different criteria. If an employee wanted to look up a patient information form and card copy, the employee was forced to look first at the date and then browse through the records alphabetically by patient. The clinic filed treatment authorizations either alphabetically or by year, and employees filed EOBs by posting date. The management of all of the clinic's documents was costing unnecessary time, money, and heavily impacting employee productivity.

"The system was ineffective, and we needed something easier to use," says Amanda Knox, business office systems analyst. "It was just very difficult and time consuming to manually pull paperwork."

## THE SOLUTION

The Information Systems Department and Business Office Manager researched Captaris Alchemy Document Management, a solution represented by DigiStor, a value added reseller and healthcare industry specialist. The clinic purchased the system and deployed it within a couple of days, immediately seeing improvements in their record keeping processes. Staff members are now able to scan patient records, insurance files, EOBs and other documents into the Alchemy repository at an average of 5,000 to 8,000 per day, and clinic personnel are able to simply call them up on their desktop computers by typing in the patient account number.

"That's one of the reasons that we went with Alchemy," Knox says. "Alchemy mimicked the way we had the file room set up, which made the transition easier for our employees. Some of the other programs we looked at were limited in the way data could be organized. To accommodate these other systems, we would have to change our organization scheme. With Alchemy, we could keep our file system the same. It made training employees much easier."

Cost was a big factor in deciding on the right solution, but Alchemy proved to be inexpensive to implement. Lisa Wood, business office manager, says the original cost of Alchemy was roughly 15 percent less than other systems. The investment is already paying off measurably. The clinic was able to keep its clerical staff at three employees instead of four, thus saving approximately \$15,000 in wages.

Employees are finding significant time-savings. Previously, account analysts had to wait up to two weeks for backup documentation that would allow them to answer patient questions, manage accounts and send out refunds. Now, this documentation is immediately available allowing staffers to answer questions over the phone, complete research the same day, and improve the relationship they have with patients. Employees resubmit claims the same day instead of waiting weeks for EOBs, improving the company cash flow.

In addition, storage costs have decreased considerably, as the following chart illustrates:

DATE	RETRIEVAL QUANTITY IN CUBIC FEET FROM OFF-SITE STORAGE	RETRIEVAL COST FROM OFF-SITE STORAGE
03/31/2003	21.6	\$36.50
02/28/2003	127.2	\$214.97
01/31/2003	38.4	\$64.90
12/31/2002	2.4	\$4.06
<b>TOTAL</b>	<b>189.6</b>	<b>\$320.43</b>
03/31/2001	89	\$163.76
02/28/2001	180	\$331.20
01/31/2001	142	\$261.28
12/31/2000	224	\$412.16
<b>TOTAL</b>	<b>635</b>	<b>\$1,168.40</b>

The clinic is now requesting 70 percent fewer boxes from off-site storage than it was two years ago, and the cost of retrieving boxes has been cut by 73 percent. Also, the practice of adding 576 cubic feet per year to the clinic's off-site storage has ceased and the monthly storage cost has stabilized. In addition, the clinic no longer needs to use a suite as a waiting area for boxes to ship to off-site storage, giving it back an additional 500 square feet of valuable workspace.

## THE RESULTS

"Alchemy has made my job easier, as I can review an EOB quickly while on the phone with patients or insurance carriers and review my correspondence when patients call back— all without leaving my desk or waiting days for copies from clerical," says Anna Diverty, account analyst. "Also, with cut and paste functions, I can create effective appeal documents or use the email function to forward documents to co-workers and doctors to be reviewed in response to a patient's complaint."

"It certainly has made my job easier!" adds Amy Woodward, Medicare review analyst. "When I work the Medicare denials and written appeals, no more pulling paper EOBs from the files on the shelves, where they were either higher than I could reach or on the floor." If Woodward or other employees have questions regarding Alchemy, the self-service online support helps with troubleshooting.

Alchemy also helps AMC comply with the Health Insurance Portability and Accountability Act (HIPAA). Patient information is no longer in plain view, and this helps preserve patient confidentiality. AMC doesn't have to worry about keeping a large file room secure, there is less confidential paper on employee desks, fewer employees are handling paper, and there are fewer copies to shred.

As AMC's data storage needs grow, the clinic continues to work with DigiStor. When AMC exceeded its hard drive space, DigiStor helped the clinic set up a DVD jukebox.

## FOR MORE INFORMATION

Captaris Business Information Delivery solutions help organizations of all sizes automate the information and document flow throughout the information lifecycle (capture, process, deliver, manage and archive). With a comprehensive suite of software and services, Captaris helps organizations to grow revenues and increase profits while meeting compliance goals. Through a global distribution network of leading enterprise technology partners, Captaris has installed more than 90,000 systems in 95 countries in companies of all sizes, including the entire Fortune 100. For more information, visit [www.captaris.com](http://www.captaris.com) or call 1.800.443.0806.

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