

Case Study

healthcare

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Pathways Transition Programs

Mental Health Agency Seeks Help, Solves Excess Paper Storage Problems

"The Ricoh records conversion project has helped to ensure that our paper-based patient records can be safely digitized and accessed quickly."

– A.J. Norris, M.Ed.
Executive Director
Pathways Transition
Programs, Inc.

ABOUT THE CUSTOMER

Pathways Transition Programs, a private mental health agency that develops services and programs for at-risk children and families, experienced unprecedented growth. Documentation was required for every patient — for every visit. The agency used paper-based document management processes and stored documents offsite but wanted to transition to electronic records retention to streamline workflow and help ensure compliance with regulatory best practices.

CHALLENGE

Pathways Transition Programs expanded from about 500 patient cases to more than 3,500 cases and referrals within two years. It hired a full-time clerk and leased two offsite storage facilities to manage the paperwork that accompanied the increased caseload.

"We've experienced tremendous growth over the past few years and managing our records had become an overwhelming cost to our time and resources," said A.J. Norris, Executive Director of Pathways Transition Programs.

A paper record was kept for every patient. The average file was about 100 pages and included a 20-page intake document and progress reports that were filled out during each subsequent visit. Every case file was stored in compliance with state and HIPAA regulations. For example, files for children had to be retained for at least 10 years, or until the child turned 21 years of age. The files included medical records and were regularly used in court cases.

CHALLENGE

- Offsite paper-based records
- Storage facility nearing capacity
- Labor-intensive retrieval process
- Inefficient chain of custody
- Need to protect confidential patient information
- Potential fines and penalties for non-compliance

SOLUTION

- Commercial Imaging Services
- Digital file conversion

RESULTS

- Reduced document retrieval times
- Decreased paper consumption by up to 200%
- Ensured seamless chain of custody
- Completed implementation ahead of schedule
- Support for compliance criteria achieved

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With the entire practice operating on paper, two 8' x 10' storage containers were quickly filled to capacity with case files. Unfortunately, the storage site was located about three miles from the mental health facility, so the retrieval process was long, arduous and risky.

Every time a case was reopened, or a file was needed in court, employees had to drive to the site for retrieval. They also had to make a duplicate to ensure that the original file remained in storage. Then, the employees transported the documents back to the mental health facility. All of the documents contained confidential information, which was potentially compromised by the process.

The agency had recently implemented an electronic system for new patient records, but legacy records remained only on paper. Two full-time administrators scanned records into the new electronic system. With the heavy workload, the transition was slow and expensive. In addition, there were no resources to incorporate the legacy files into the conversion process.

SOLUTION

The agency chose Ricoh Document Services to convert legacy patient files to an electronic format. The Ricoh team moved quickly. It met with key members of the mental health agency to identify requirements for the implementation, including timelines. Then, Ricoh invited four agency administrators to tour the Ricoh production facility in Atlanta to showcase its capabilities.

The agency was impressed with Ricoh's attentiveness and capabilities. They were even more impressed once the Ricoh team began the digital document conversion.

The team arrived onsite to retrieve the files and followed appropriate HIPAA chain of custody regulations. Hundreds of boxes, filled with hundreds of thousands of pages of patient records, were taken from the storage facility. Every step of the process was documented. Ricoh technicians provided accurate records for every document taken from the storage facility. Likewise, documentation clearly identified which documents were returned. As a result, agency staff had access to every file during the conversion — even the files in Ricoh custody.

The Ricoh team scanned the documents at its production facility using state-of-the-art technologies. The electronic files were placed on a padlocked-protected hard drive to protect data integrity. The Ricoh team physically delivered the hard drive to agency staff and received the next batch of files for conversion.

RESULTS

The tedious, paper-based records retention process has been transformed into a fast, easy-to-use electronic files system. It offers intuitive navigation to expedite document retrieval for administrative and clinical staff. Users can simply log in and locate the patient file within moments from any location using any web browser.

"The electronic records created by Ricoh are easy to navigate and have reduced the time needed for administrative and clinical staff to locate client information," said Norris.

Every patient record is now stored as a PDF file. As a result, users can print documents at more convenient locations to reduce the risk of losing critical documents during transport. Plus, the original files remain in the system, regardless of how many times it is accessed or retrieved, so there's no need for duplication. Pathways Transition Programs has reduced paper consumption by about 200% since implementation.

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“The Ricoh records conversion project has helped to ensure that our paper-based patient records can be safely digitized and accessed quickly,” said Norris. “Beyond the fact that the project has streamlined processes, the actual work of Ricoh was smooth and created no disruption to services at our office.”

The implementation was projected to take up to six months to complete. Ricoh finished within four months. In addition, the new electronic document system has enabled the agency to reduce its administrative workforce by one full-time employee.

“All of our office staff members have commented about how helpful Ricoh was, how simple the process was, and how we were able to move faster than the timeframes we had outlined,” said Norris.

Now that legacy and current patient files are easily accessible, the agency wants to streamline workflow for other documents. Ricoh will help the agency convert all personnel and business documents and contracts to electronic format, too.

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