

An Evolution of Growth



CapitalCare supports healthy growth with Laserfiche as its evolving ECM/BPM standard

Formed in 1998, CapitalCare Medical Group is a physician-owned medical practice with 27 medical offices across four counties in upstate New York, with central business offices located in Albany. CapitalCare's staff of over 150 professionals offers primary care services in Family Practice, Internal Medicine and Pediatrics, as well as specialty care services in Endocrinology, Pulmonary and Sleep Medicine, Developmental-Behavioral Pediatrics, Allergy, Asthma & Immunology, medical nutrition therapy and comprehensive diabetes education, plus a state-of-the-art clinical laboratory.

By 2007, CapitalCare's decade of growth had the side effect of generating more paperwork than the group's 14 offices could efficiently manage—at least not the way they had been. “We were on our fourth expansion in our central office building in Albany; our offices were running out of storage and our CBO had rooms of files and boxes everywhere. So we asked ourselves, ‘Why all this space for storage? Why all this time to find things?’” says Charles Hagstrand, CIO of CapitalCare. “After 10 years, we needed a solution to move us forward.”

Hagstrand envisioned a true enterprise content management (ECM) solution from the start, one that could manage CapitalCare's spectrum of information needs, including 700,000 patient encounters a year being stored remotely to over 280,000 EOB documents generated annually, as well as other documents and business records associated with its various practices. Eventually shared back-office business processes would be automated, beginning with AP processing.

Moving forward with a ‘push technology’

“Initially we looked at a lot of vendors who had products that handled specific document types, but we were looking for something that wouldn't pigeonhole

us,” recalls Hagstrand. “You see a lot of departmental applications in larger organizations. We wanted a single system that could fit a variety of needs in different departments, and that ultimately could grow with us.”

Hagstrand found what CapitalCare was looking for when his evaluation team discovered Laserfiche through reseller JPI Data Resource. “It was the product's versatility that really won us over,” he says. “We liked that Workflow was a push technology that could keep things moving more effectively.”

Adds Jason Wicks, business analyst, “Laserfiche was like one-stop shopping as far as addressing the range of projects we were looking at, from HR files to Accounting and through-processing contracts and invoices. It's very flexible.”

Wicks worked with JPI and CapitalCare department heads to design and deploy a pilot 20-user Laserfiche system with Records Management Edition (RME) and Workflow. They mapped out a multi-phase implementation that would eventually include using RME to automate retention and compliance, as well as Workflow to route invoices from CapitalCare's central business offices in Albany to the group's various remote locations for AP processing.

The first order of business was addressing Hagstrand's storage and access concerns. “We took the approach that we should start by working with the items that didn't involve Workflow first,” Wicks says.

Implementation began with backlog conversion of a decade's worth of historical files in the HR and Medical Management departments, “just taking paper and getting it in Laserfiche to get people used to archiving,” as Wicks puts it.

The impact was immediate. “Our first touch is our site managers who are working with our patient encounters—that totals over 700,000 documents a year,” Wicks explains. “We used to have to process those in our central business office, then send them back out to the sites to store for seven years. Now they’re all inputted when received from the site and accessed as needed through Laserfiche.”

Standardizing to streamline AP processing

The next phase of implementation deployed Workflow to help automate AP processing for CapitalCare’s accounting department—which has seen the number of sites it supports grow from 14 to 27 in the four years since Laserfiche was acquired in 2007.

“Before Laserfiche, AP processing wasn’t very efficient, nor was there a common practice for approving invoices,” Wicks explains. “Some bills were received at the site, approved and forwarded; others came to the CBO and were distributed for approval and return. Laserfiche allowed us to standardize the process, and that’s been a big time saver.”

Thanks to Laserfiche, turnaround time for AP processing was reduced from 7–10 days to 2–3:

- Invoices are now captured and sorted centrally using Quick Fields in CapitalCare’s Albany office.
- Workflow then automatically routes the invoices to the appropriate site managers, who are notified through email that they have a document to approve with a shortcut link to retrieve the document.
- Working in conjunction with a custom file export tool developed by JPI, approved documents are then automatically pushed from Laserfiche to CapitalCare’s Great Plains accounting system via QuickLinks and PaperSave.

“Accounting now knows what documents need approval and which documents are in a queue once the site has approved the document,” Wicks says. A backup copy of the exported document is created using Workflow, which, after 30 days, is automatically deleted by a Workflow activity.

The next phase, Wicks adds, will be to establish a centralized shared service center, where invoices will be processed directly from the central business office.

“Workflow will set up queues for each of our sites’ accounting departments to process invoices,” he says.

An overall benefit, Wicks says, has come from the time saved making action items more available to site staff. “Although we have a separate solution to store patient medical information for continuity, middle management at each site—typically one or two employees—utilizes Laserfiche to access past patient encounters, approving invoices and coding corrections, and this has eliminated a lot of lag time.”

The future of the future: Workflow

Future projects are already slated—including implementing RME. “The functionality of Records Management Edition will assist with purging documents once they have reached their shelf life, while Audit Trail will help keep us in compliance,” Wicks says.

Hagstrand says even the IS Department has its own ideas for how to utilize the system. “We’re actually hoping to use Laserfiche to manage our service agreements, so we’ll be able to run queries and see what’s going to expire in the next year.”

“The system keeps evolving as we bring on more documents and processes,” add Wicks, pointing out that Workflow will play a more leading role in future deployment. “I’d say we’re at the grassroots of pushing information between sites and departments. Right now, I’m looking at any situation where we have an opportunity to push documents and how we can utilize Laserfiche to automate additional functions between our practices and our central business office,” he continues, noting a recent meeting with a business unit to discuss improving billing and coding through automation. “Workflow has really worked out for us because we can take the visual process of scanning documents and apply that to designing workflows—it’s very intuitive.”

This versatility, says Wicks, is why Laserfiche use continues to evolve. That, and Wicks makes sure CapitalCare’s 50 named users know just what’s possible using the system that solved their initial storage problems.

Says Wicks, “We need to do more education within the company to say ‘This is a lot more than just a scanning solution’ and hold a ‘Did you know?’ session.”

About Laserfiche

Since 1987, Laserfiche® has used its Run Smarter® philosophy to create simple and elegant enterprise content management (ECM) solutions. More than 30,000 organizations worldwide—including federal, state and local government agencies—use Laserfiche software to streamline document, records and business process management.

Your Next Step

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