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Streamlining the Release of Information Process between Health Information Management Services (HIMS) and Patient Financial Services (PFS)

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Sarasota Memorial Hospital (SMH), an 806 bed acute care public hospital located on the Gulf Coast of Florida, implemented an automated release of information (ROI) workflow application. Prior to implementation, HIMS and PFS release of information processes were separate departmental procedures. HIMS utilized an outsource vendor while PFS performed most release of information functions in-house. The outsource vendor worked with PFS staff for those requests that required both medical records and billing records. The HIMS Director and PFS Director wanted to realize economies of scale in combining the two departmental processes to decrease the number of steps to process a request and to decrease request turnaround times.

As many hospitals in today's challenging healthcare environment, SMH maintains a hybrid record to include a clinical information system, a document management system for paper generated documents as well as the traditional paper and microfilm for historical records. The outsource vendor maintains a separate office within the hospital and is responsible for all billable and non-billable requests. The HIMS staff and the outsource vendor staff access information from all aspects of the hybrid record in order to fulfill requests for release of information.

When the document imaging project began, a Release of Information sub-team was created as part of the overall project team. This team included representation from Information Systems, Health Information Management, Patient Financial Services, the outsource release of information vendor, an operational consultant from the document management vendor as well as the SMH Project Manager. We held ROI team meetings in addition to the regularly scheduled project meetings. We reviewed all ROI procedures between HIM, PFS, and the outsource vendor. We identified opportunities for increased efficiencies and identified new processes. We, then, developed courseware and trained staff on the new processes.

SMH went live with the document management system and new release of information workflow on May 1, 2006. Prior to implementation, there were 16 steps involved in the release of information process and the turnaround time was five to six days. Currently, the process involves seven steps and the turnaround time is two to three days. The outsource vendor has incorporated all PFS release of information requests into their daily routine without increasing FTE's. Previously all communication between PFS and the outsource vendor was carried out utilizing interoffice communications and could add days to the turnaround time for those requests requiring both medical records and billing records. Today, the PFS mail room staff scans a request for information directly into the workflow generating a work item in the appropriate work queue for the outsource vendor. They can also forward requests back and forth to each other as necessary. The workflow allows the ability to divide the work into user defined work queues based on the type of request. Additionally the workflow includes productivity and management reports providing easy tools for reporting statistics.

As a result of the implementation of an automated release of information workflow, Sarasota Memorial Hospital has realized improved productivity and decreased request turnaround times. Additionally, the management teams have the ability to easily track requests through all stages of the release process, generate accurate page counts for all types of records released, and the staff can easily communicate electronically regarding the progress of each request.