Electronic Document Management

It's Not Easy to Go Paperless, But the Savings are **Big**, the Staff is **Happy**, and Lab Inspectors Are **Impressed**!

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Table of Contents

- The MHG Lab
- The Push to Switch
- Goals, Needs, Wants
- Solution and Budget
- Implementation
- Hindsight
- Consideration
- What's Next

MGH History
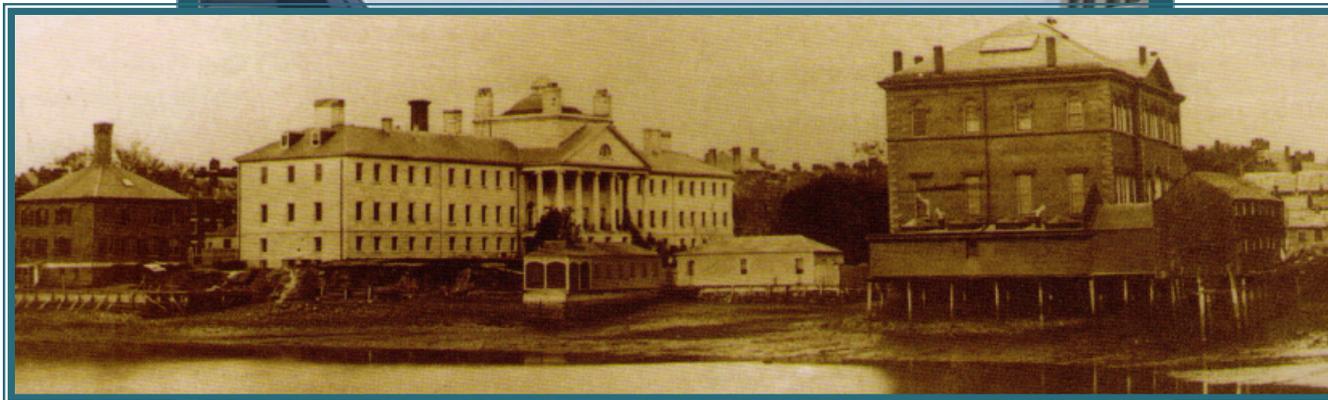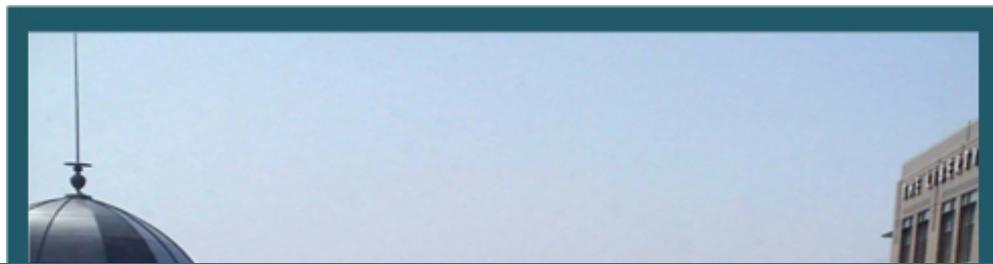
10 Million Clinical Laboratory Tests Annually

650 Employees

80 Faculty

50 Residents

71 Different point-of-care sites

18 CLIA certificates to manage

Old Document Control Process

Old Document Control Process

Approver (s)

Revision needed

Editor
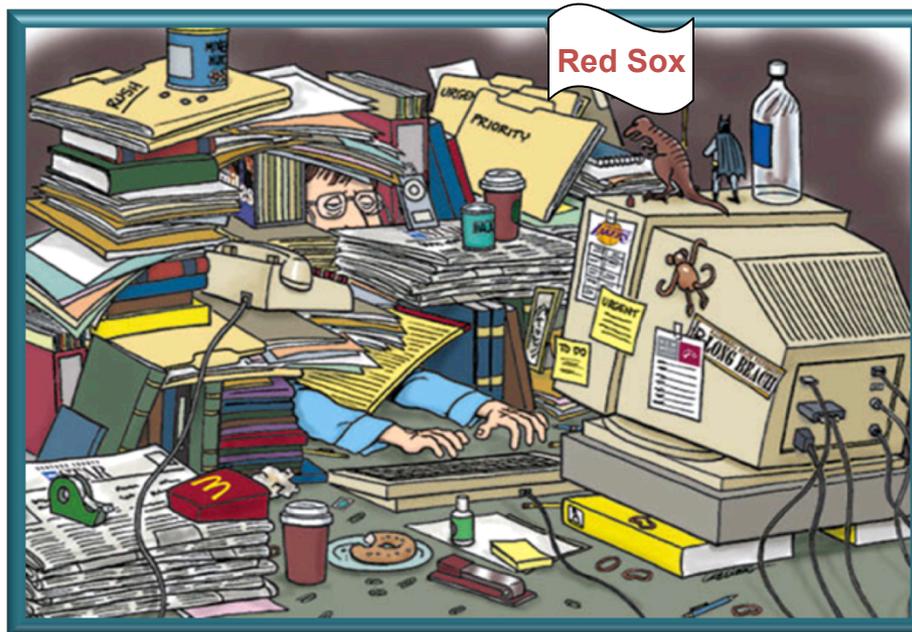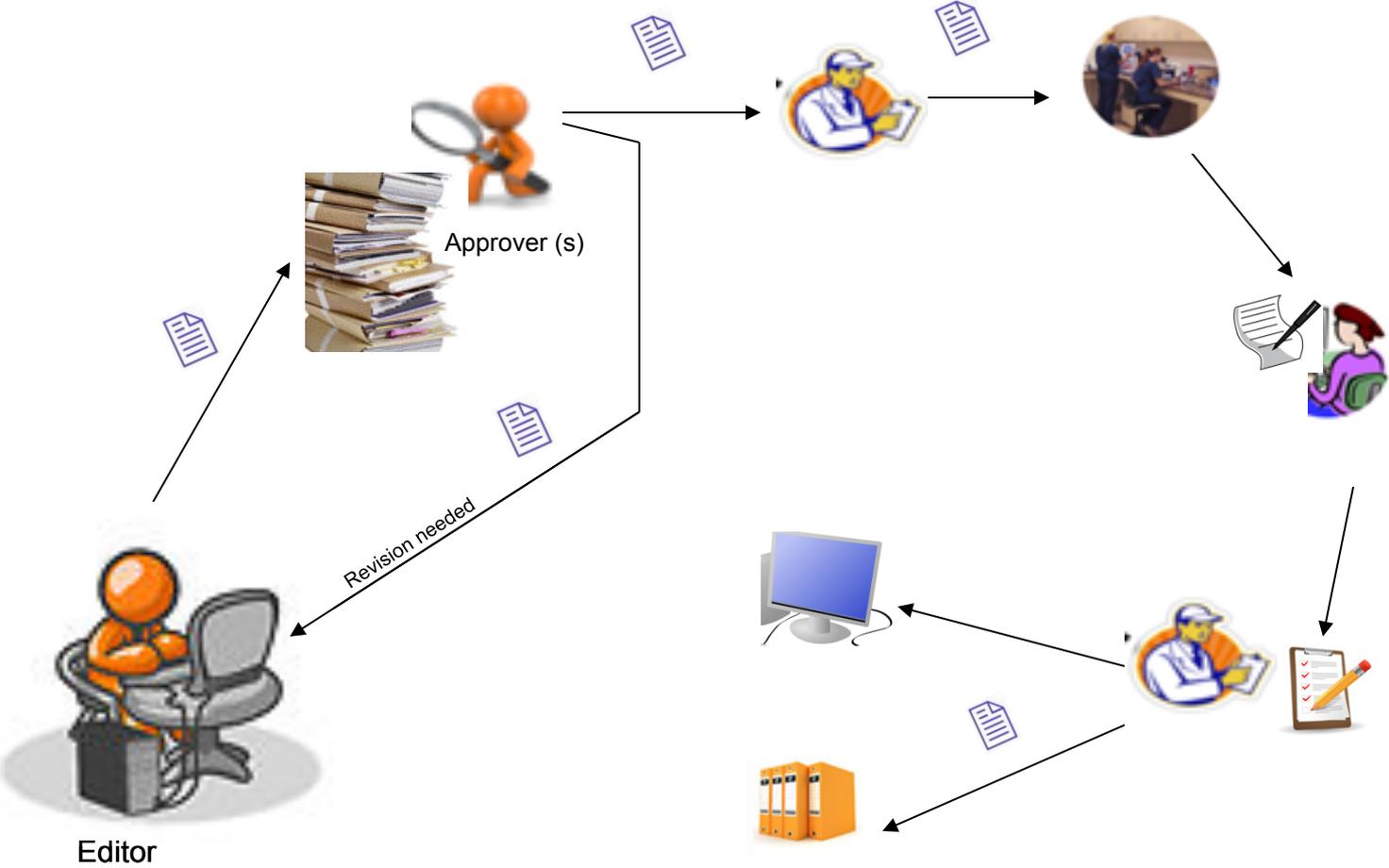
New Document Control Process

Approver(s)

Publish
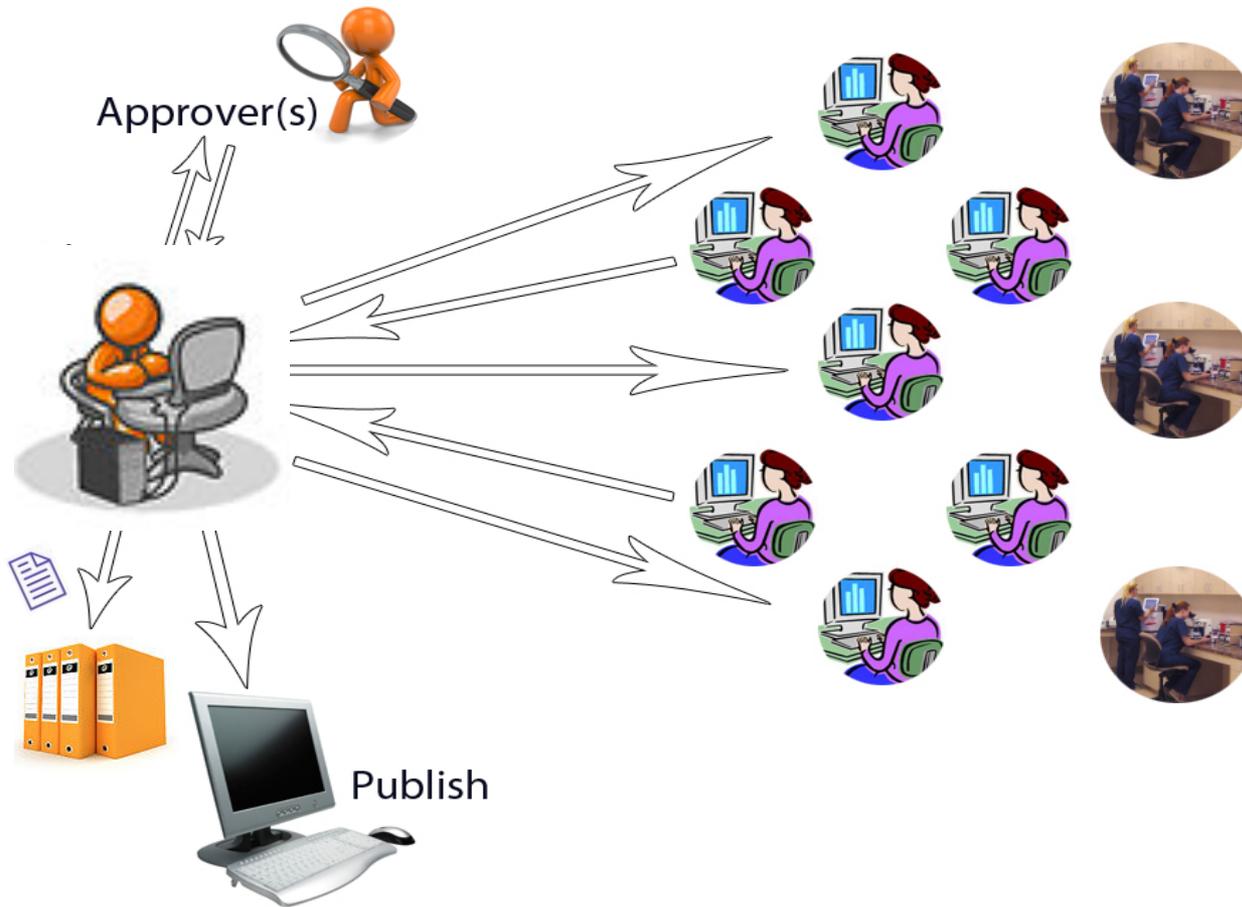
Budget and Selection Process

- Price

- Expertise

- References

- Lab-specific

- Decision = SoftTech Health

Implementation Process

- Installation on SoftTech Health's offsite servers

- Side-step the need to go through IT department

- Automatic headers

- Batch import

- Milestones

Project Plan

Service Standards

- Current and readily available
- Personnel have read relevant to their job activities
- Authorized by the laboratory director
- Discontinued archived
- Master index
- Record Retention
- Standardize format and change control

Implementation Plan

- Purpose
- Scope
- Service Standards
- Project Teams
- Major Tasks
- Timeline

Major Tasks:

- Installation and document preparation
- Training tools and plan
- Go-live plan
- Guidelines for use and verification

Training Plan

SoftTech Health- Go Live Training Outline

Administrators, Editors, Coordinators

Note: appropriate CAP Competency assignments will be made following the live editor training sessions to trainees.

Administrators and Editors (with editor and personnel pe
- ☐ Overview
- ☐ Training session
- ☐ CAP Course and Checklist "SoftTech DMS Doc administrators), to be completed off line then do
- ☐ CAP Course and Checklist "SoftTech DMS Pers (administrators and coordinators)
- ☐ CAP Checklist "SoftTech DMS Approver Trainin
- ☐ CAP Checklist "SoftTech DMS End User Trainin

Editors (without personnel permissions):
- ☐ Overview
- ☐ Training session
- ☐ CAP Course and Checklist "SoftTech DMS Doc administrators), to be completed off line then do
- ☐ CAP Checklist "SoftTech DMS Approver Trainin
- ☐ CAP Checklist "SoftTech DMS End User Trainin

Coordinators (personnel/reading list permissions only):
- ☐ Overview
- ☐ Training session
- ☐ CAP Course and Checklist "SoftTech DMS Personnel-Reading Lists-Tasks (administrators and coordinators)
- ☐ CAP Checklist "SoftTech DMS End User Training", contains link to Captivate Video

Approvers

Note: Lab trainers will assign checklists via CAP Competency module for approvers that have a CAP Competency account. For approvers that do not participate in the CAP Competency module a copy of the checklists should be used as a guide for training and provided to the approver.

- ☐ Overview
- ☐ In lab training
- ☐ CAP Checklist "SoftTech DMS Approver Training", contains link to Captivate Video
- ☐ CAP Checklist "SoftTech DMS End User Training", contains link to Captivate Video

End Users only:

Note: Lab trainers will assign Read and Sign for the end user instructions and CAP Competency Checklist

- ☐ In lab orientation/training
- ☐ CAP Checklist "SoftTech DMS End User Training" Contains link to Captivate Video

What would we do differently?

- Switch to a separate dedicated business network without video streaming

- Check assumptions at the door!

- Encourage laboratory leadership communication
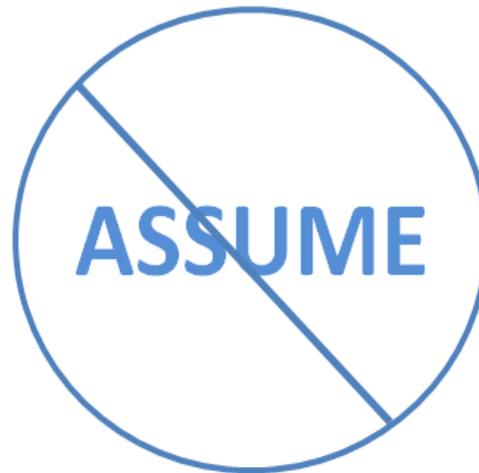
What did we do right?

- Training plans

- Flexible training method

- One-on-one sessions

- In-house SoftTech User Group

- Big-picture approach
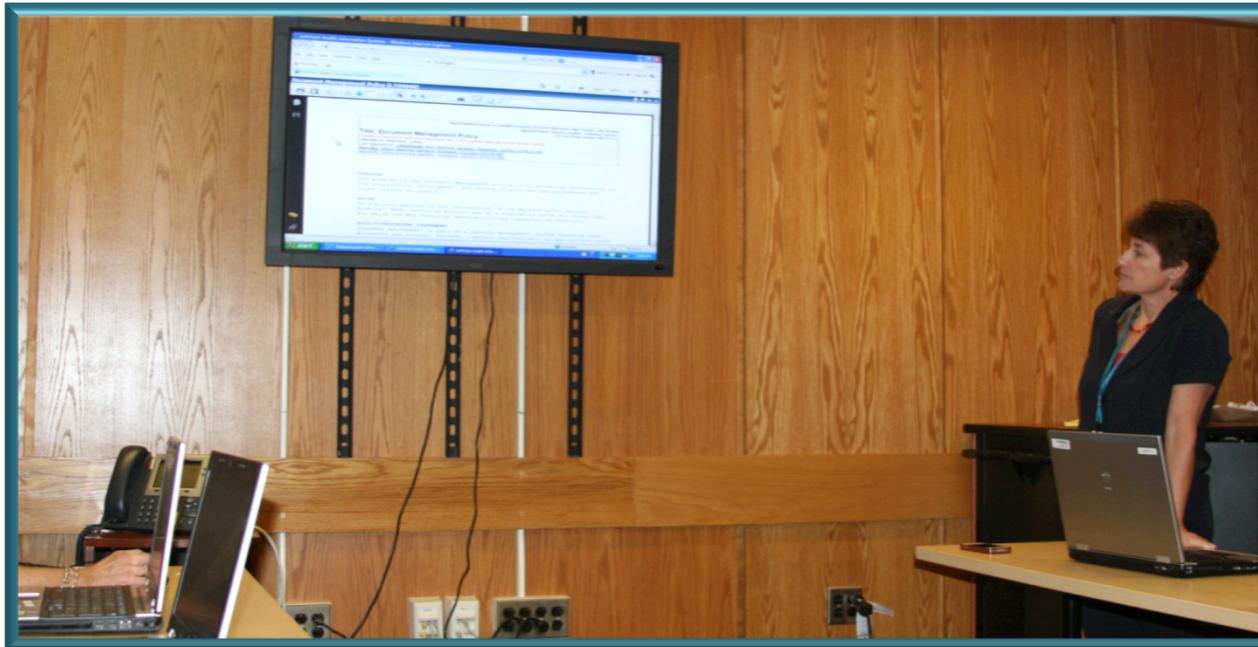
Our Histopathology Group: "Spear-Carriers"
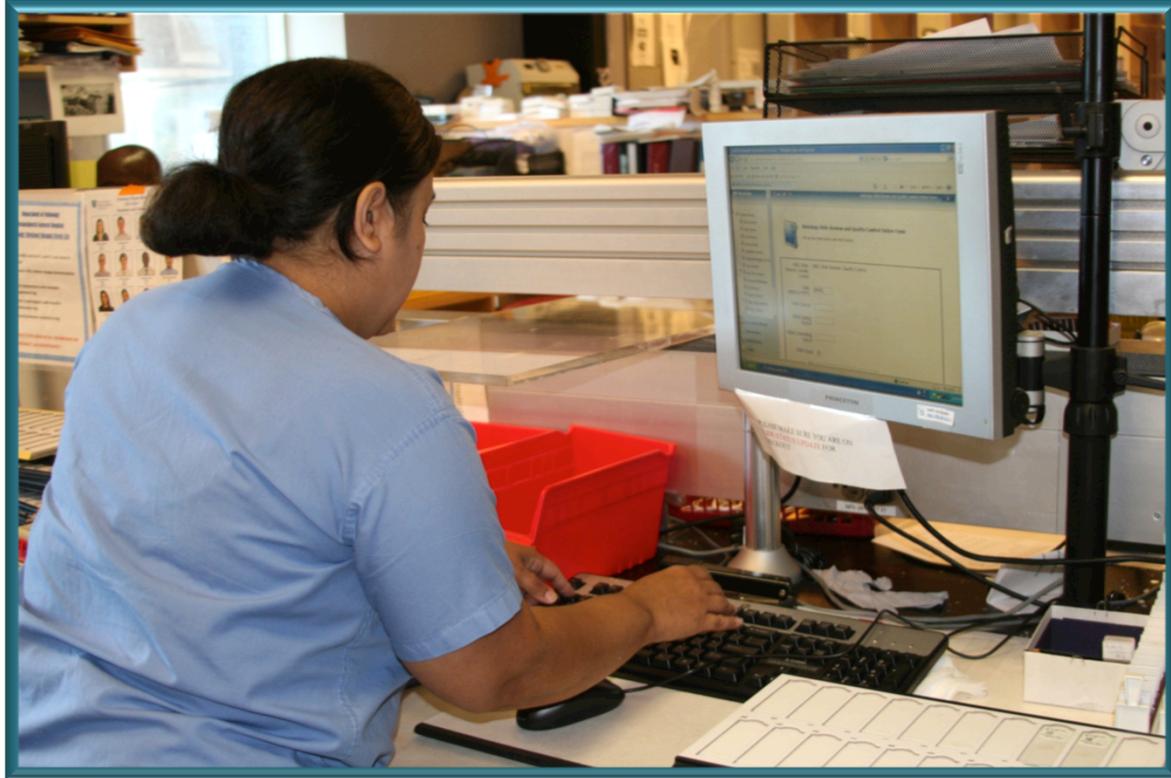
Where are we now?
Did we realize our goals?
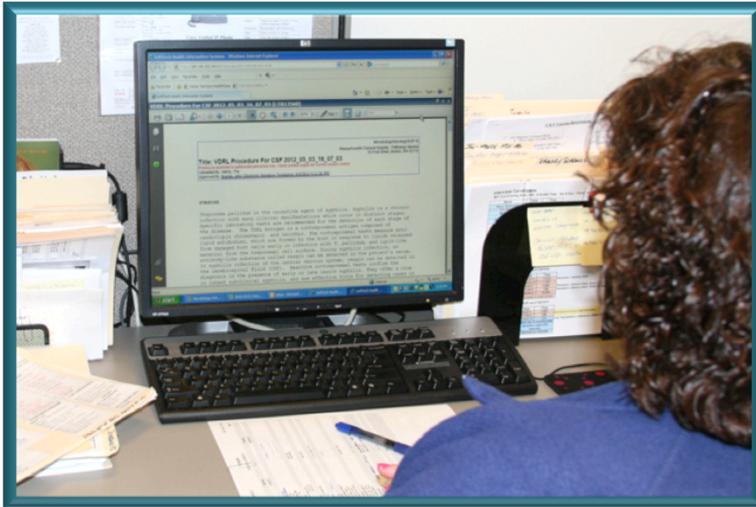
- Compare our "Before and After"
- Paperless with all forms and logsheets
- Quality Management
- Document Control with SoftTech
- Automatic cross-publishing to the Intranet
- Accessibility

"…without an electronic solution we didn't think we could ever get to where we are now."

System Statistics

- System Logins: 31,475
- Tasks Delivered: 27,285
- Active Folders: 796
- Archived Folders: 53
- Active Files: 3861
- Archived Files: 720
- Active Files Converted to PDF: 3312
- Active Files Display in Original Format: 549
- Total Stored File Revisions: 8808

Conclusion

Thank You

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