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PAPERLESS FORMS IN HEALTHCARE: MAKING THE TRANSITION AVOIDING THE PITFALLS

Deborah Kohn, MPH, RHIA, FACHE, CPHIMS, FHIMSS



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Conflict of Interest Disclosure

Deborah Kohn, MPH, RHIA, FACHE, CPHIMS, FHIMSS

Has no real or apparent
conflicts of interest to report.

LEARNING OBJECTIVES

- **Transition from analog to digital the hundreds of forms with which healthcare professionals have to work on a daily basis**
- **Successfully select or use a Forms Processing system or application**
- **Define and deploy digital forms**

FORMS!!!

ENTER

Paperless Forms
Electronic Forms / eForms /
Automated Forms

Forms Processing Systems
or

Electronic Forms Management Systems

eForms

- eForm “data capture” / “data collection” systems or applications embedded in:
 - Clinical Information Systems / Electronic Health Record Systems / Electronic Financial Record Systems
 - External Websites / Internal Intranets / Portals (i.e., web-based content) systems

eForms

- **By now, the many advantages of eForms over analog / paper forms are obvious.**

Today's Healthcare Organization

- Despite the advantages of eForms and the implementation of healthcare organization information systems, mounds of analog, paper forms still exist.



Today's Healthcare Organization

- **Within a healthcare organization's governance structure, the Forms Committee probably is the most unappealing (B-O-R-I-N-G), and the task at hand probably is the most thankless.**

Making the Transition

- **View eForms Strategically**
 - **include eForms as part of the healthcare organization's IT Strategic Plan.**

Making the Transition

- either as an EHR / EFR
 - component technology / system, such as a PACS or a Coding - Grouper system
- or as an EHR / EFR
 - “bridge” technology, such as document imaging technology or film digitizing technology
- and as a component of the organization’s web-based initiatives

Making the Transition

- **It's an Ongoing Process**
- **It requires good Project Management skills**

Avoiding the Pitfalls

- **When selecting a Forms Processing system or application:**
 - **eForm design**
 - ease of use, drag / drop objects onto a form template, predefined fill-in fields (SSN, birth date, current date)
 - **eForm reuse**
 - **Import / Export of XML schema / .docx files**
 - **eForm template customization**

Avoiding the Pitfalls

- **When selecting a Forms Processing system or application:**
 - **Data integration**
 - **Database lookups**
 - **Key in name, and then other fields are populated from database**
 - **eForm routing, workflow, predefined work queues**

Avoiding the Pitfalls

- **When selecting a Forms Processing system or application:**
 - **eForm management**
 - **Ensuring that only the latest eForm versions are circulating**
 - **eForm repository for storing, searching, etc.**

Avoiding the Pitfalls

- eForm **Features / Functions**
 - **Incorporate eForm authentication, authorization, timed logouts, and audits for documentation compliance.**

Avoiding the Pitfalls

- **eForm Features / Functions**
 - **Utilize existing and accepted standards for eSignatures – ensuring the same legal weight as a signed, paper form.**
 - **PINs/Passwords, ePens, Trusted Certificates, Biometrics**

Avoiding the Pitfalls

- **eForm Features / Functions**
 - **Offer electronic acknowledgement for eForms that are successfully submitted.**
 - **This is what you documented, ordered or requested. Do you agree?**
 - **Here are the calculated totals and / or confirmation numbers.**

Avoiding the Pitfalls

- **eForm Features / Functions**
 - **Increase eForm intelligence and reduce key entry with direct feedback.**
 - **Typically, this requires Java scripts / Active X controls to calculate field results and validate entries.**

Avoiding the Pitfalls

- **eForm Features / Functions**
 - **Validate rule enforcement BEFORE clicking on SUBMIT**
 - **Does the system allow the eForm designer to easily embed rules and data relationships into the form?**

Avoiding the Pitfalls

- **eForm Features / Functions**
 - **Incorporate multiple file types (Word, PDF, HTML, XML) into the eForms**

Avoiding the Pitfalls

- **Either look for applications that are not disconnected from your other data capture / data collection systems**
- **Or consider applications / systems that can be easily integrated into your existing information systems.**

Avoiding the Pitfalls

- **Look for applications that incorporate eForm version / revision control.**
- **Watch for applications that do not require authors to review all documentation prior to eSigning (i.e., allowing for blanket signatures).**

Deborah Kohn, MPH, RHIA, FACHE, CPHIMS, FHIMSS

**Principal
Dak Systems Consulting**

650.345.9900

dkohn@daksystcons.com

www.daksystemsconsulting.com

