

Making the Paperless Transition Less Painful

Written by [medmonthly](#) on September 29, 2017 in [Features](#)

Going paperless is easier said than done. Many doctors and dentists are frustrated and disappointed by the process, reporting increased workloads and decreased efficiency. Some even revert to their old, paper-based systems. However, you can avoid the hassles and enjoy very real benefits with careful planning and realistic expectations. Here's how.

Plan Before You Purchase

One of the most common mistakes is choosing an EHR (Electronic Health Record) system without adequate forethought and planning. According to a recent industry survey, most doctors spend less than six months choosing software, and they usually demo two or fewer systems before purchasing. The same survey found inadequate features to be the most common reason for switching EHRs.

You can save money and avoid a lot of stress for your entire team by taking the time and making the effort to choose the right system.

- Analyze your current workflow. Every process that involves paper will need to be converted. Determine what the system needs to do, who will need to use it, and what levels of access they will need to have.

- Involve your team. Of course, you know how your own practice operates. However, you probably don't know much about the fine details of daily tasks such as appointment scheduling or billing. Talk to the people who do those things every day. Find out what functionality they need, and what features would make their jobs more efficient.

- Verify compatibility. Paper is inefficient. A person must look at the document, get the information, and then write or enter it somewhere else – every single time it is needed. You might be surprised to learn that the same thing can happen with digital documents. If you plan to use the system in conjunction with other software, make sure it is compatible.

- Choose practice management software. If you choose a comprehensive suite that includes EHR, don't underestimate the importance of other components. Evaluate the scheduling, billing, and other modules just as carefully as the EHR. Alternately, you can use separate software. However, you will still need to choose your management software before purchasing an EHR system, so you can ensure they are compatible.

- You need customer service. No matter how carefully you choose, implementing the system will not be easy. Even once the transition is complete, a small glitch in the software could bring your office to a halt. Make sure that your vendor is an established, reputable company with good customer service and technical support.

PLANNING FOR LESS PAPER

Going paperless is not simple, nor is it a once-and-done endeavor. An effective transition is a well-planned, long-term process. Instead of expecting it to happen suddenly, commit to reducing paper use bit by bit, and taking the time to improve your workflow along the way.



IDENTIFY TYPES OF PAPERWORK IN YOUR OFFICE

An EMR (Electronic Medical Record) system can't handle it all:



CHOOSE THE RIGHT SYSTEMS

For each type of document that you want to digitize, evaluate the workflow, and select a system that will accommodate.

- How many people touch or read a document? How do they use it?
- Where is it stored? How many times is it moved?
- Is the document created in your office? What is the source of information?
- How often is it accessed or updated?
- What level of security is needed?



OPTIMIZE YOUR WORKFLOW

As you analyze your current processes, watch for the following opportunities to make improvements:



SIMPLIFY YOUR PATIENT FORMS

If you are ready to digitize your forms, now is the time to evaluate and improve them.

- Remove unnecessary questions. Do you actually need or use all of the information collected?
- Eliminate redundancy. Does the patient have to enter the same information in multiple places?
- Clarify instructions. What questions do patients frequently ask when filling out forms? Which parts seem to confuse people?



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Efficient Implementation

You finally found the perfect system for your practice. Now what? Start with realistic expectations and a long-term plan. The transition to paperless would be better described as a gradual shift to less paper.

There are two reasons an EHR system will not suddenly eliminate paper. First, the task of digitizing existing records is monumental. It cannot be accomplished quickly, even if you dedicate several staff members to data entry. You can reduce the disruption, and the burden on your team, by updating records gradually.

New patients should be entered in the system right away, so that you don't accumulate more paper records. Also, attach data entry to scheduling for returning patients. When a patient makes an appointment, office personnel should check the digital records. If that person is not in the EHR, they should be entered immediately. This will ensure that every person you treat will be in the system, and that records for active patients are gradually converted. For archived records, have your team enter a few per day or week. Set a reasonable goal, depending on the size of your staff.

The other hurdle to a truly paperless office is things that fall outside the realm of EHR. You might have employment applications, lease agreements, financial reports, and dozens of other types of paperwork besides patient records.

An attempt to convert everything at once can throw your office into chaos. Instead, take it one step at a time. For example, you might start with the EHR, and after it is functional, implement cloud-based bookkeeping, then move on to the human resources department. This allows your team to focus on learning one thing at a time, and minimizes disruption to daily operations.

Improve Efficiency Along the Way

No matter how well you plan, moving to the paperless world will cause a degree of upheaval in your office. Some routines will have to change. You and your team will need to learn a new system, a new way of doing business. Instead of viewing the disturbance as a detriment, think of it as an opportunity. While you are already changing operational procedures, you have a chance to improve them.

You will need to carefully evaluate the workflow and processes in every department. Along the way, you may discover certain tasks that are unnecessarily complicated or inefficient. Maybe the receptionist answers all phone calls, when a phone menu could route them directly to the correct person. Maybe one person sends appointment reminders one day in advance, and someone else sends them two days in advance. Maybe three people are involved in a process that could be completed by one person.

The upgrade to digital is also an opportunity to improve your own forms and internal paperwork. Instead of directly converting paper forms to digital, revamp them. Add and remove questions to provide more of the information you need, and less irrelevant or redundant data. You can also add more detailed instructions and documentation, because digital forms are not limited by the size of a piece of paper.

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