

Solution Redesign for Medical Non-Profit



RPI Consultants Case Study | Published Monday, December 11, 2017

RPI Consultants partnered with a non-profit medical organization to redesign and implement a new automated solution to streamline medical transcript application processing with their existing instance of Perceptive Content (formerly ImageNow). The client had previously relied heavily on manual interactions to support this process which created inefficiencies and problems related to application processing time and exception handling, including manual indexing, routing, and follow-up.

Based on prior successful projects with RPI Consultants, the client tasked RPI to find and implement efficiencies to unburden end users from manual indexing, routing, and exception handling. Through careful process analysis, RPI was able to implement new features and automation to help the client meet these objectives.

Client and Solution Background

Transcript applications had been processed manually for years, but higher volume and increased complexity created growing burdens on processors. In response, this client implemented Perceptive Content to help improve visibility and create efficiencies through electronic capture and routing of application and transcript related documentation.

Through this legacy solution, users manually indexed, reviewed, and routed Transcript Applications along with groups of related documents to review queues for verification and processing. After various reviews, these documents would be manually routed again to be physical printed based on the transcript type. Documents would then be routed again, in some cases to the same users, so that a single custom property could be manually set on every single document.

Having all individual Transcript Applications and related documents spread across review and exception queues often led to confusion, loss of document lifecycle, and ultimately delays in turning around transcript requests. The client knew there had to be ways to improve and potentially automate parts of this process, and based on positive experiences with RPI Consultants they engaged RPI to help find the right solutions.

The Power of Automation

For this project, RPI Consultants tapped into deep knowledge and experience with Perceptive Content Workflow and engaged our dedicated team of senior developers to help with automation through Perceptive iScript. iScript is a powerful toolset, based on Java, that helps automate custom tasks and processing in Perceptive Content Workflow.

The primary focus area was the processing and routing of up to 100 related documents that needed to be linked and reviewed for each Transcript Application. The legacy solution relied on manual indexing and routing of each supporting document to various review queues. This created unnecessary complexity and higher processing times due to users manually searching for other related documents, and redundant indexing on each document.

Client Profile

This client serves as a non-profit governing body for medical license management and transcript distribution. Governance and timely turnaround of application documents is critical to their operations and ensures medical professionals and healthcare organizations are equipped to help patients in a meaningful and ethical manner.

By the Numbers:

- + 5-10 Perceptive Content Users
- + Process apx 5,000 docs / month
- + Up to 100 supporting documents per Transcript Application

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RPI Consultants first identified and implemented a solution for grouping all related documents using Folders, a structure within Perceptive Content that organizes documents related to a common document or record. RPI quickly developed and implemented a new iScript to automatically create these Folders and add new supporting documents to them, as well as specific routing logic. This iScript also contains intelligent logic to search for in-flight applications when delayed transcripts have been completed, previously a very time-intensive manual task.

Through this single iScript and minor workflow modifications, RPI was able to save the client and end users a huge amount of time by automatically indexing documents, moving redundant indexing to the Folder level, and organizing all relevant documents together in a single Folder in Workflow.

Finally, Intelligent Exception Handling

With any workflow solution, there will always be exceptions. RPI worked closely with this client to understand all the possible processing exceptions, and specifically focused on designing smarter way to handle frequent transcript cancelled requests. After documenting the appropriate logic and preferred handling, RPI developed and implemented another iScript that enabled Folders to be routed for "Ad-hoc" processed when requests were received - regardless of where they are in workflow.

Summary

Perceptive Content and **Perceptive Workflow** are powerful tools that help adapt manual paper processes into digital workflows. Many organizations have implemented processes into workflow only to find that the process itself could be improved through automation. As demonstrated through this client's solution, application processing or case management that includes a high amount of related documentation can create chaos and slow down processing time and completion. Through careful process analysis and skilled development, processes can be improved by reducing manual interactions and intelligently organizing documents around specific records.

About RPI Consultants

RPI Consultants is a professional services and consulting firm with over 18 years of experience supporting ERP, ECM, and Advanced Data Capture products and solutions, including Lawson, PeopleSoft, Perceptive Content, Kofax, and OnBase. RPI Consultants is based out of Baltimore, MD, with other offices located in Tampa, FL and Kansas City, MO. For more information on RPI Consultants, please visit www.rpic.com.

About the Author



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Alex has six years of experience designing, implementing, and supporting enterprise content management solutions with Perceptive Content (ImageNow), OnBase by Hyland, and Kofax products. A master of automation, Alex strives to help his customers find ways to increase efficiency, thereby lightening their workload.