

➔ GO INTERACTIVE!

Electronic forms sound simple! Just scan existing forms into an electronic venue, right? **This is the first and biggest mistake made by hospitals researching eForms.**

When implemented correctly, eForms technology provides efficiencies and cost-savings for every spoke of the revenue cycle. But, success is all about planning and preparation. Below, we'll share the experience we've gained through helping hospitals implement eForms – and share their lessons learned to help you get a head start on your eForms journey.



➔ PLAN AHEAD FOR SUCCESS!

As you consider switching your hospital from paper to electronic forms, consider the following seven steps. A little planning now will save you many headaches and dollars in the years to come!

1. Are *your* patients ready to sign tablets over paper?

Will your specific patient-base be comfortable signing forms electronically? If they aren't today, they may be in just a couple of years. **Does your eForms vendor accommodate both paper and electronic methods?**

2. Do you have a Forms Committee?

If not, you need one. Forms Committees are extremely important as you look to overhaul your existing forms. As you create your forms committee, be sure to include representation from all areas of the hospital that touch forms.

3. Are existing forms viable in an eForms environment?

The Forms Committee needs to review all existing forms to determine their electronic viability. Should they be eliminated or updated? Are there any legal concerns regarding this form?

Some things to consider:

- **Registration forms can vary depending on the hospital. Dbtech has seen some processes that use one form and some that use seven.** Ask yourself, can registration forms be combined into a singular form? Can you modify form language to permit easier reading by employees and/or patients?

- **When moving from paper to Interactive eForms, remember your digital environment.** Paper forms are read in portrait mode whereas digital forms are often read in landscape mode (think signature pads & tablets!) This may seem obvious, but so many organizations fail to modify their forms in this regard.
- **How will patients read Interactive eForms?** Will you use an additional registration screen, a laminated copy of the forms, or will you have an additional tablet computer accessible to the patient?

4. What are the eForms project tasks and goals?

Clearly define project tasks and goals. Projects are more likely to succeed when there are clear, accessible and attainable tasks and timelines. An eForms project can be a time consuming process, so don't forget to celebrate success!

CHOOSE A VENDOR

5. What does the Vendor mean by eForms?

eForms have received a lot of buzz recently, and marketing departments know what catches an audience's attention. But, smart hospitals know to categorize potential eForms vendors into three groups:

Print & Go :



Blank forms are made available through a web-based portal. Users print forms as needed or submit an order for bulk printing. New forms and modifications are completed by the vendor for a fee. This is a dying breed, but will suffice some needs.

Print-To-Scan :



Vendors merge patient data with a form, then print it with barcodes. This creates efficiencies for scanning processes, but does little to eliminate paper. Forms are either requested by an end-user or automated by an interface transaction. New forms and modifications are typically completed by the hospital and disseminated immediately.



Full-Service :



Vendors provide Print-To-Scan and interactive online forms. These vendors are Full-Service because they also offer printed and interactive forms, production services, ongoing eForms maintenance and API's to link their technology with any IT platform. Evaluating an eForms API should be a part of any eForms decision. **Dbtech is considered a Full-Service eForms vendor.**

6. Create a checklist of required technology.

Your hospital will need to compile a customized list of all technology elements important to your particular organization – but this list should help you get a head start:



VENDOR CHECKLIST

- ☐ **Is there an API to the eForms functionality?**
Can the vendor link your EHR to their eForms? A complete API will permit users to auto-launch an eForms interface from within any existing IT application (*i.e. calling registration forms from within the EHR registration screens.*)
- ☐ **What interfaces does the eForms vendor support?**
Will the vendor use HL7 to build databases to merge with eForms? Choosing an eForms solution that maintains a database of merged data is important so that you can operate when your EHR is down or inaccessible.
- ☐ **Does the eForms vendor use HL7 in a pass-through mode?**
In this scenario, patient data is merged with eForms, then deleted – hence the name, “pass-through”. This method is perfectly acceptable, but will be inoperable if your registration system is down.
- ☐ **Will the eForms vendor provide downtime functionality?**
Some eForms vendors maintain a copy of the completed eForms while some others provide functionality to add data from other systems. With the second scenario, a hospital could publish critical clinical data to their eForms solution as backup for times when the EHR is inaccessible. In addition, some eForms vendors have even created downtime registration systems to collect registration data and interface it back into the EHR.
- ☐ **Does the eForms vendor support electronic signature?**
E-signatures include approvals and digital replications of wet-signatures. Approvals are authenticated through the user’s login and password, whereas digital replications include signature pads.
- ☐ **Are eForms created and maintained using conventional desktop tools like MS Word or Adobe Acrobat?** Or, does the vendor require you to learn a proprietary form-building tool?
- ☐ **Which barcode symbologies are included?**
Remember these barcoded forms must be recognized by your existing document imaging solution and medication administration solutions.
- ☐ **Will the vendor charge your hospital for creating or updating new and existing eForms?**
This question is critical if you desire to self-manage your eForms environment. Assure that any additional fees will not prohibit the expansion of your eForms solution.

➔ MEASURE!

7. Gather base-line statistics, then compare!

The benefits of eForms are wide and varied, but without knowing your base-line statistics, you will never know if your eForms project plan was a success. **So what needs to be measured?**

Paper use –

You will use less paper if you implement interactive online eForms but first, determine what you use now! How many sheets of paper are used in the registration process? How many registrations per year?

Scanning effort –

Moving from a workflow where documents are identified as they are scanned, to one where that process is eliminated means a huge savings in time. Interactive eForms will provide for the greatest efficiencies, whereas barcode-enabled eForms will provide less. How long does scanning take now?

Change Management –

Replacing an existing form in a paper-based environment is slow. All older versions of the forms must be identified and destroyed. This can be an arduous task fraught with failure, since workers tend to hide forms away in their departments. eForms permit immediate and pervasive change with the click of a button.



➔ GOOD LUCK!

Dbtech wishes you the best as you embark on creating a successful eForms implementation for your hospital. This paper is an abbreviated version of what dbtech covers with clients during an eForms implementation. **We'd be more than happy to create a customized task-list with you for your hospital.** Please do not hesitate to contact us if you have any questions. We look forward to hearing from you.

**To learn more about eForms, call dbtech: (800) 760.4096
or visit www.dbtech.com**