

“FileTrail helped us gain control over patient charts. Without it, we would require a staff of hundreds to manage charts with the same control and timeliness we currently have.”

Ellen Morrow

Records Manager
Blue Ridge Behavioral Healthcare

Case Study

Blue Ridge Behavioral Healthcare

Healthcare organization gains control over medical files with FileTrail.

Client Profile

Headquarters: Roanoke, VA

Industry: Healthcare

Blue Ridge Behavioral Healthcare provides healthcare services in mental health, mental retardation and substance abuse to patients in Botetourt, Craig, and Roanoke counties in Virginia. BRBH was established in 1969 as a Community Services Board. Today, BRBH has 40 programs with 450 employees working to provide these services.

FileTrail Implementation: 2004

FileTrail Products Implemented

- **FileTrail Enterprise** - Complete file tracking and records management automation across multiple locations.
- **FTMobile™** - The software allows files to be checked-in, checked-out, transferred and boxed without being tethered to a workstation.
- **FTSynchronize™** - Loads and updates data from upstream resources to keep FileTrail data synchronized and up-to-date with authoritative systems.
- **FTColorLabel** - On-demand printing of color-coded folder labels.

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Background

As the Records Manager for Blue Ridge Behavioral Healthcare (BRBH), Ellen Morrow had a daunting task when the clinic centralized all of its outpatient records in a single building. Morrow's office of Human Information Management (HIM) controls records for all of the units of the clinic. Each week, her area checks out nearly 600 charts for the clinic's mental health, mental retardation and substance abuse patients. On top of that, they maintain closed charts from a number of other buildings spread across a three-county area.

“Now that we're in one building, it would be a mob scene, chaotic if we didn't have some way for people to request records in advance. Our workload has almost tripled since we moved, and I don't think we could do it without FileTrail,” Morrow said.

Increased Efficiency for Staff and Patients

BRBH installed FileTrail in January 2004 and has been using the system extensively ever since. FileTrail enabled the clinic to convert its decentralized, manual filing system to a centrally automated system that offers greater convenience and efficiency. With this single platform, BRBH handles records tracking and management for 17 locations across Botetourt, Craig and Roanoke counties.

“We now have a single resource for chart information,” Morrow said. “I like FileTrail. It's doing exactly what I want it to do.”

Implementing FileTrail was a major change, but the transition went very smoothly with the staff.

“People expected FileTrail to be complicated, but when they took the FileTrail training, they said “This is easy, I like this; FileTrail is working out well,” Morrow remarked.

Managing Records Before FileTrail

Before implementing FileTrail, most units tracked and managed charts the traditional way - manually. Each of the units, scattered all over town, had its own approach to dealing with records. When staff members wanted a file, they requested them any number of ways - by fax, email, voice mail or in person. Also, each unit had its own file room and filing system.

Application Highlights

- A single platform manages 17 locations across a 3-county area on a SQL Server 2000 database .
- Configurable fieldsets adapt to fit the clinic's needs for searching, identification and retrieval.
- Integration tools leverage data from billing and appointment systems to eliminate data entry.

Key Results

- **Increased Efficiency** - Charts are pulled in advance and ready for appointments.
- **Time Saved** - Charts are quickly located and retrieved for walk-in patients.
- **Labor Saved** - Online chart location eliminated physical searches for charts.
- **Standardization & Automation** - Chart appearance is standardized and automated color-coding saves labor in chart creation.

Customer Insight

Implementing only the tracking or the color-coding separately would not have provided the same impact as the whole solution. We had management support, participation from technical staff and strong project leadership and that is what it takes to get an organization through even the smallest change, but the results are well worth it.

About FileTrail

FileTrail, Inc., is the leading provider of browser-based records management solutions. Companies of all sizes turn to FileTrail to streamline processes with the latest technology and most configurable software. Headquartered in San Jose, California, FileTrail has been providing solutions for records management since 2001.



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Managing Records Before FileTrail

Some units filed alphabetically, others numerically, and some of them just stuck the files in drawers and hunted for them when needed. Each unit of the clinic was self contained and didn't bother with charts for other units. Sometimes the nurse, doctor and case manager all maintained multiple charts on the same patients.

"We looked busy, but we were doing a lot of duplicate and useless work," Morrow recalled.

New Capabilities and Benefits

FileTrail offered BRBH new capabilities over the old way of managing records. Any of the clinic's employees that use the system can search the database and instantly locate charts in any of the 17 locations. Previously, no one knew for sure where each chart was located. Now thanks to FileTrail, tracking charts is faster, easier and more efficient.

"The system allows us to tell exactly where a file is supposed to be," Morrow said.

Also, employees can order charts through the computer several days in advance, eliminating the need to fill out and file request cards. Then a day before the chart is needed for the appointment, the active charts staff will pull and deliver the files. The clinic's employees like the system because it's easy for them to use, and saves time and hassle.

"It really saves them some work because they can request charts well in advance and they don't have to think about it until the client comes in," Morrow said.

Looking Forward

With FileTrail's 100% Web solution, BRBH can look forward to saving labor every time an employee handles a chart. A typical clinic can reduce filing costs by 40%, save 80% of archiving time, and reach 100% destruction compliance.

Cost reductions and other improvements generate a very fast return on investment (ROI). FileTrail customers generally report a positive return within just three months of installation - much faster than the one or two years that are typical for other conventional tracking systems. FileTrail is the ultimate chart management and tracking solution.

Contact FileTrail Today!

For more information about the benefits of automating with FileTrail, call your local FileTrail representative at:

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