

# Costs Down, Service Up in the Paperless World

by Will Lockwood

**E**xperience has taught Steve Carlton, owner of Spectrum Pharmacy, in Las Vegas that there are only two major economic variables when it comes to running a pharmacy: the cost of goods and the cost of labor. And it is only the cost of labor that Carlton expects to have any chance to control. He does this by focusing on technology that gives him greater operational efficiency and more flexibility in how he assigns tasks to his staff. So in July 2004, when he started Spectrum, a closed-door long-term care pharmacy with satellite offices in Reno and Tucson, he was on the lookout for any new technology that would help his staff work better. He found just such an enabling technology in the DocuTrack paperless document management system from Integra and promptly installed it in December 2004.

## **A History of Innovation**

Ask Carlton about his passion

for automation, which made him jump at the chance to put in DocuTrack, and he'll tell you that it actually goes all the way back to 1998, when he last owned a pharmacy. There he installed an automated compliance-packaging system that let him centrally fill prescriptions for all his pharmacy locations. This centralized automation helped Carlton build his former operation quickly, without having to add personnel. DocuTrack is a natural extension of this approach to running a pharmacy. When he opened Spectrum, both satellite pharmacies did data entry on their own. DocuTrack lets Carlton centralize document intake at his Las Vegas site and do the data entry there, but to leave filling, labeling, and dispensing to the satellite pharmacies while still allowing access to any document from any of the three pharmacies. Considering that Spectrum serves facilities with about 3,500 patients, the benefits of centralized handling of all calls and faxes are significant.

## **Bird's Eye View**

For example, DocuTrack lets Carlton see the workload facing his staff at all three sites broken down into easily understood categories. "A pile of paper faxes doesn't tell you much," he says. "I need to know which are new, what department they are going to, and which need priority handling." The paperless system means that he now has the ability to rapidly assess the amount of work in any given department, including medical records, the business office, and order entry, and to move his staff to where they are most needed. Carlton can even connect to the system over the Internet. So whether he is in the pharmacy or not, he has access to the information he needs to find bottlenecks in the workflow and fix them. "From a management point of view, this is fantastic," he says.

## **Easy Access**

DocuTrack also eliminates the

need for Spectrum staff to make trips to the fax machines and sort through the incoming paper. "I want to keep everyone at the workstations, which is where the most gets done," explains Carlton. DocuTrack does this by making electronic copies of documents available directly on his staff's computers. In the case of prescriptions, the orders appear on the DocuTrack screen at data entry and become permanently tied to the corresponding screen in Spectrum's QS/1 pharmacy management system. This means that the original order and the information entered by the technician are always available, for example to the pharmacist at final verification. Documents are then also easily searched using such criteria as facility, patient, order, and date. Additionally, the records, from the original order to the scanned-in delivery sheets and anything else related to a specific order, are all linked together for ease of retrieval. So, for example, when a nurse calls from a facility to inquire about an order faxed in, Spectrum staff has immediate access the whole document chain. There's no need to fish through storage boxes and no risk that a file will be missing an important document. The staff also has the ability to fax a copy of a document back to a facility, complete with a free-form note added, and keep a record of the communication in the original file.

### **Easier Audits**

Ready document retrieval is also of great importance when it comes to audits. Previously, to prepare for an audit, Carlton would have to call the storage facility, have them deliver boxes of documents, and sort through the contents on a conference table. Now he simply seats the auditor at a workstation and provides access to all the requested files directly from the DocuTrack database.

Carlton thinks that this ability to painlessly and quickly comply with audit requests is going to prove even more valuable, considering the host of new third-party payers that have come online to service the Medicare Part D population. "I think we're going to face an even higher level of scrutiny," he says. "But I am also more comfortable now dealing with audits."

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### **More Tools to Come**

While DocuTrack has proven its worth to Carlton from day one, he is also looking forward to a few new features that he will deploy shortly. The first is a bar-code scanning tool that will let DocuTrack read refill requests right from the bar code peeled from Spectrum's thermal prescription label and applied by the facility to its order sheets. As these faxes come in, DocuTrack will read the order sheets and automatically pass the bar-coded information to the QS/1 system, which will then initiate the refill process. "Refills account for 55 to 60% of our business," he explains. "So it will be a big boost to process these without any staff needing to touch them." Next, he is getting ready to implement bar-code scanning at delivery, which will eliminate the need for scanning in paper manifests back at the pharmacies. Instead, confirmations of delivery will be transmitted to Spectrum throughout the day, just as with the major package delivery companies. Finally, Carlton is getting a tool to help with the prior authorization (PA) requests for Medicare Part D. The appropriate forms for all of the PDPs will be loaded into

the DocuTrack system. Carlton's staff will be able to enter information from the QS/1 system or from a new order into the PA request and fax it right to a PDP. "All of these new tools will be tremendous assets," says Carlton.

### **Instantly Paperless**

While it is clear that Carlton is a big fan of technology that creates efficiency in general and paperless document management in particular, perhaps what has pleased him most about DocuTrack has been its ease of use. "I've been involved with a lot of different software over the years," he says. "Something always goes wrong with a new installation." But he got a pleasant surprise in the transition to DocuTrack. First, Integra came in and spent an hour with Spectrum staff explaining what they were going to do. Then they came back and did the installation. Finally, they followed up with an in-service educational session with the pharmacy staff, and Spectrum was paperless that day. "When we went live, we went directly from being a paper-based operation at 3:59 p.m. to being paperless at 4 p.m.," says Carlton. "We expected glitches, but there weren't any." Integra kept support staff on site briefly to make sure the transition went smoothly. From then on it has been a simple matter of normal, ongoing support for the system. One thing that has not surprised Carlton is the impact that going paperless has had on Spectrum's operations. "Paperless document management helps us meet our clients' expectation that we are cutting-edge," he explains. In his view, paperless document management has made Spectrum Pharmacy a stronger competitor in LTC, a provider of top-notch service to its clients, and a more fundamentally sound business. **CT**

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