OUTSIDE THE BOX: Using DocuTrack in a pharmacy's accounting and problem resolution departments

THE CHALLENGE

Anyone in the institutional pharmacy industry will tell you that DocuTrack is the leading workflow and content management system. But Minnesota-based Midwest Medical Pharmacy isn't content with simply using DocuTrack to process prescriptions. Since implementing DocuTrack in 2010, Midwest Medical has put DocuTrack to work in their Accounting and Problem Resolution departments. Keith Minich, IT Manager at Midwest Medical, spoke to us about their processes.

Traditionally, Midwest did everything via paper and managers were not getting their invoices in a timely fashion. "Managers weren't approving invoices in a timely fashion because there was no visibility about whether or not they had even gotten those invoices," said Minich. "We kept everything in boxes and it was not separated out in any way, shape, or form. So we would have to sort through a box full of hundreds of invoices to find what we were looking for.

"But we know that with DocuTrack, everything is trackable. So we started examining how we could take advantage of that in the departments that needed help."

RESULTS: Accounting

"We use DocuTrack for our accounting, as far as keeping track of all invoices that we've received. We have document import rules set up on the scanner that our Accounts Payable person uses. She scans all of our invoices into DocuTrack and we have a search folder set up for each one of the managers for all of the different lines of the business. After all the invoices are scanned in, the managers go into their folder and approve the invoices and change the status to 'AP Pending' so they go back to the Accounts Payable person. She then knows it's been approved and it's ready to be paid.

"DocuTrack helps tremendously for staying on top of our accounting processes. The best part for us is we can find out where a specific invoice is in that whole process, and if it has been given to the manager, and whether they have approved it. If something is being held up, we use DocuTrack to determine where the bottle-neck is, and why an invoice is being held up. It's easier from the standpoint of being able to have a lot more flexibility than you do with some of the other applications out there as far as being able to automate things. If I as a manager need to go back and look up an invoice from six months or a year ago, all I have to do is go into DocuTrack and search for that document."

About Midwest Medical

Based in Minnesota, Midwest Medical was founded in 1981 to serve the LTC, DME, Retail, and Compounding markets. Serving 600 beds, Midwest Medical also uses DocuTrack in their accounting and problem resolution departments.

Interfaces:

- QS/1®

About DocuTrack

DocuTrack is a workflow and content management system that organizes, routes, stores, and retrieves content. Experience instant order access, a convenient audit assist workspace, intelligent archiving, automated routing, and eRx functionality.

About Integra

Integra is a pharmacy software company whose suite of products – DocuTrack, DeliveryTrack, Logix, and Integra Cloud Fax – reduce pharmacy costs, increase productivity and profits, and enable the highest levels of customer service. Talk to Integra today to see how our products can help your pharmacy: (866) 257-4279 or sales@integragroup.com, or visit www.integragroup.com

RESULTS: Problem Resolution

Midwest also used DocuTrack for their problem resolution group, where any of the customer complaints and any outstanding issues that need work are kept. "We have an Adobe form that people can email directly into DocuTrack. The completed form goes into DocuTrack and the problem resolution group will code it, put any kind of notes, status, or whatever needs to be done. This really helps us keep track of that issue so that we can make sure that we're taking care of any outstanding issues that our customers may have. We even use this for employee complaints or internal issues that we have.

"We previously moved our PRG to another program, but we actually just moved it back into DocuTrack because our PRG person preferred the way DocuTrack handled the department."

Flexibility

Minich had a few final words regarding other institutional pharmacies. "I really don't know why other people aren't using DocuTrack elsewhere in their pharmacy. Maybe they aren't aware of the flexibility the application has in being used outside of the Rx world. That's the nice thing about DocuTrack, you can customize it to be used anywhere in your business.

"I think this flexibility is a really good extra feature. With enough playing around with it, I'd be willing to bet you could probably set DocuTrack up to be used with just -

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about any other application or any other function, especially with the expertise that Integra has as far as the people on staff. I've never called up and gotten the answer of, 'That's not possible.' I always hear, 'You know, that's a really good idea, let's look into it.' That's just one of the things that I think that is really encouraging about Integra as a company, too; you are always looking at better ways to do things."

The Future

With the Accounting and Problem Resolution processes firmly in place, Midwest is now looking to their next steps. "We're always looking for other ways to use DocuTrack. We're going to do something within our compounding areas as soon as we lay out exactly what we want to do. That will probably be sometime this year. And once Logix is mature and people start using that product, DocuTrack is just going to get even better."

BENEFITS OF DOCUTRACK:

- Customizable workflow
- Integration with other technologies
- Document search
- Complete audit history
- Barcode processing

Contact Integra today to see how DocuTrack can improve your pharmacy's workflow operations.

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