

CASE STUDY

Managing Release of Records Requests

Primary Care Partners



BACKGROUND

Established in 1998
Grand Junction, CO

Family Practice Group,
Independently Owned

70 Providers
9 Physician Practices
3 Locations

Deployed Chart2PDF:
Summer, 2021

THE CHALLENGE

As a busy primary care group practice, Primary Care Partners (PCP) of Grand Junction, CO had many bulk chart release requests for several 3rd party needs such as legal and insurance audits, disability requests, and MD transfers. In addition, the number of individual patient and MD referral chart requests was on the rise.

Their legacy chart release application had limited functionality and required manual intervention to get the release of information necessary for the specific format requested, in an accurate and timely manner.

Release of records was becoming increasingly troublesome with workflow bottlenecks creating inefficiencies at a time of staff shortages and increasing chart release requests. PCP determined that they needed a more full-featured application that would fit their current 3rd party requests and work effectively with a planned medical records workflow reorganization to address their growing needs.

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As a large primary care practice, release of records was becoming an increasing challenge that our legacy charting system was unable to address. We needed a solution that would easily manage the volume and complexity of our requirements and enable a planned departmental reorganization.

We looked to our trusted partner, Keena, who recommended their Chart2PDF solution. The product was efficiently implemented and has allowed our organization to meaningfully increase our release of records output. We have been able to meet our growing volume and complexity of reporting demands.

Chart2PDF also fit very nicely into our departmental reorganization plans and streamlined our processes to the point where provider and staff fatigue with release of records workload has been nearly eliminated. We're very happy with the product and Keena's support of it.”

— **MICHAEL MILLER**

Director of IT, Primary Care Partners – Grand Junction, CO

THE SOLUTION

Chart2PDF
Meets Release
of Records
Workflow
Requirements

As a trusted vendor over many years, PCP reached out to Keena to provide them with a solution to their chart release requirements. After a thorough evaluation of Keena's Chart2PDF application, the final decision to move forward with Chart2PDF was an easy one.

Keena's implementation team was deployed after careful planning around a Touchworks EHR upgrade. The entire implementation, system configuration, testing and training took about 4 weeks to complete.

THE RESULT

With Chart2PDF fully deployed and Keena's consulting team in place for support, PCP was able to leverage the enhanced chart release and formatting capabilities to easily meet the needs of their 3rd party release of records requests.

BENEFIT TO Organization

Chart2PDF's enhanced capabilities resulted in the following benefits for PPC:

- Chart production capacity increased substantially from pre-Chart2PDF capacity.
- Quick response to bulk chart extractions for legal and insurance audits were enabled without interference to system performance during peak work hours.
- Chart2PDFs enhanced filtering and formatting capabilities were leveraged by HIM department to easily meet 3rd party records release requirements.
- Advanced patient searching significantly reduced the time required for individual patient and MD release of records needs.
- Data security improved as PMI was more securely protected through the software's password protection functionality.

BENEFIT TO Providers & Staff

PPC's medical records teams release of records production was significantly enhanced due to the advanced features and capabilities of Chart2PDF.

Provider involvement in Medicare and/or legal chart auditing tasks was dramatically reduced.

Chart2PDF solution very nicely enabled PPC's plans to streamline their release of records workflow process to reduce provider and staff fatigue.

BENEFIT TO the Patient

In common situations where a patient needs a release of records form to take to provider to another healthcare or insurance organization, it's now a very quick and convenient process for them.