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THE DIGITAL OFFICE - PART 8: CHOOSING THE RIGHT SOFTWARE, A CASE STUDY

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The transition from paper to digital records sometimes poses some surprising hurdles. In this case study, we talk with one eyecare provider who discovered that some of the greatest challenges in going digital aren't technical at all.

Dr. Kristine Eng of Orinda Optometry Group in Orinda, CA, said that her practice began the transition to digital records in 2004. The practice was growing rapidly, and it became necessary to adopt more efficient ways of scheduling patients and managing records.

Orinda Optometry Group already had a practice management system in place, but it was being used primarily for billing and patient recall. When the office expanded, however, previously simple tasks became much more complicated.

"More people needed to use the appointment book," said Dr. Eng, and as the practice continued to grow, it became more and more challenging to locate patient records in a timely manner. Implementing an electronic medical records (EMR) system would make it possible for multiple departments to access the same record at the same time.



Finding a Solution

Dr. Eng, who works with her father, says that improving the way patient records were handled became a top priority for her as soon as she joined the practice. She spent hours in exhibit halls where there were a huge number of software companies vying for eyecare professionals' (ECPs') business. It was so early in the game, however, that it was difficult to determine which companies would ultimately become industry leaders.

"I couldn't tell who was going to be around for the long term," she said, "so I held off for five years."

Once the dust settled, so to speak, Dr. Eng got serious about her search. She was looking for an all-in-one, customizable EMR/practice management solution. She didn't want to have to purchase separate modules, and she didn't want the practice to be forced to alter its way of doing business. Ultimately, Orinda Optometry Group opted for a software package called MaximEyes, which is highly customizable and offers both EMR and practice management features.



Getting It Right

For the most part, getting the system up and running wasn't terribly challenging. Orinda Optometry Group hired a consultant to help ensure a smooth transition, and an on-site trainer did an excellent job of preparing the doctors and staff for launch. In fact, whereas Dr. Eng and her colleagues had reservations about switching to EMR right away, the trainer convinced them it was possible and had everyone up to speed within two days. Data conversion, a stumbling block for many practices, also went very smoothly.

More difficult were the challenges surrounding customization. For Orinda Optometry Group (which handles a very large number of contact lens patients), it was necessary to make some significant changes to the contact lens areas of the application. These changes were needed in order to make the contact lens screens more detailed and more consistent with the practice's established way of doing business.

The software company was very supportive during this process, Dr. Eng said, but getting the application right took a significant amount of time. “Sometimes you know what you want, but you don’t know how to get there,” she said. “This is actually a challenge that we continue to have, just getting the software to work the way we want it to.”

The Human Factor

According to Dr. Eng, some of the greatest challenges in going from paper to digital records weren’t necessarily the technical challenges, at least not for her practice. “You really have to change the way you’re thinking,” she said. Implementing a digital system made it difficult, for example, to bring on new employees who weren’t used to dealing with patient records in an electronic format. It became much more important to hire people who were already technologically savvy.

While training had gone well, the transition to a new system presented procedural challenges. It was difficult to ensure that everyone was using the new system in a consistent way. “If everyone’s not doing things the same way,” she said, “it’s much easier for information to get lost. That just doesn’t happen with paper charts.”

To minimize the potential for errors and mishandling, Dr. Eng and her team have implemented detailed protocols for even the simplest of tasks such as updating a patient’s address. These protocols make it much easier to ensure that information is managed in a consistent way throughout the practice.

Ongoing Challenges

Dr. Eng admits that Orinda Optometry Group’s transition to electronic records has not been without hiccups. There’s one area in which the practice has been dragging its feet since the MaximEyes implementation, patient charts. While the practice does have a scanner, paper charts are convenient and scanning takes time.

These challenges aren’t uncommon. Many ECPs struggle with incorporating image files into their EMR solutions. Because these files are so large, special hardware accommodations must be made; and lots of big files can cause software slowdowns.

“We originally began the process [of scanning patient charts] two years ago, but it was just too much of a hassle to deal with,” said Dr. Eng. “So we actually bought a completely separate document-management system so those files wouldn’t bog down MaximEyes.”



The idea of purchasing a second program solely for document management had been proposed by the implementation consultant. But even with the new system, the process was still too cumbersome. Recently, however, MaximEyes launched a new feature that allows for the conversion of image files into PDF format. Thanks to this new feature, Dr. Eng’s team is currently in the process of adopting this final step toward a 100% paperless system.

Dr. Eng said that her team still doesn’t necessarily intend to incorporate everything into the MaximEyes system. The practice recently acquired a new Humphrey Visual Field Analyzer. Based on what she’s heard from other practices, Dr. Eng said she’ll probably keep that system operating independently. Likewise, the practice’s existing system for managing other digital images is working fine, so she doesn’t intend to make any significant changes.

Lessons Learned

According to Dr. Eng, she and her colleagues have largely been satisfied with their decision to implement MaximEyes. There have been minor snags along the way (mostly related to software updates), but she still feels confident that she made the right choice.

Among the benefits are improved accuracy, efficiency, and even quality of care. The new system has made it much easier to look at changes in a patient’s condition over time. “Of course, you always do a case history,” she said, “but I feel like it’s much more thorough when you can just copy forward all of the old information.”



Dr. Eng also believes strongly that storing patient data electronically is much more secure than a paper-based system. While a fire or flood can destroy an entire roomful of paper records, electronic records can be easily backed up. At Orinda

Optometry Group, for example, Dr. Eng has put into place two simultaneous onsite backups and one automatic offsite backup. So even if there's a catastrophic event, patient data won't be affected.

During the software selection process, Dr. Eng spoke with a number of other ECPs about what they did and didn't like about their EMR/practice management systems. She and her staff visited other practices to see various products in action, and she highly recommends that other ECPs do the same before investing in a software package.

"Not only was I looking at the way they utilized their software," she said, "but also how they integrated it into their offices. [The software] can change the entire flow of an office, and that is one thing I didn't realize on the front end."

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