

Docman case study - Westbury Group Practice

Westbury Group Practice is an eight GP practice located at three sites, serving over 18,000 patients in the Wiltshire town of Westbury and the surrounding villages. We have been scanning since 1996 using an application written by one of the then Partners. Although an ideal solution for many years, there had been no changes to the system and with the developments in commercial document management products, it became apparent that the time had come for a change.

We use the Vision clinical system and have been since the days of Vamp, with all three of our sites connecting to our clinical server and we have a total of about 55 pc's, seemingly growing all the time. In addition, we have our own mail/file server, electronic patient check in and some of our GP's connect remotely from home too. We are also fortunate enough to have our own IT Manager, who we share with another local surgery.

When we started looking at a replacement for our in-house scanning solution, we drew up a short list of requirements, which included:

- Seamless integration with Vision so patient documents are available to clinicians at all times
- Electronic processing of documents, so once a document was scanned the original was no longer required and things didn't get 'lost in and in-tray!'
- On-screen commenting and annotations
- Live document history to know who a document was with and what decisions/actions had been made
- Full audit trail
- Document search
- Permissions defined by user
- Accessible over three sites
- Ability to scan both patient and non-patient documents
- High volume handling
- Migration/integration of 9 years worth of historical scanning

This last item was of critical importance to us, as we needed to ensure all 325,000+ historical documents and their links within Vision, could be read by the new system and that we wouldn't need to run two systems side by side.

We evaluated the different products available at the time against these requirements and had demonstrations of two. After the demonstrations and discussions with the companies, it became clear that PCTI Docman was the best product for our needs. It met all our requirements and of utmost importance, we had confidence in the ability of the company to integrate our past 9 years of data from an obscure outdated database into their system!

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Due to our large historical dataset, the preparations for the install were comprehensive and PCTI wrote a conversion tool from our old database to the new one. The install itself was pretty painless, much of the work was carried out with no disruption at all to our working and we only had a day and half break in scanning incoming documents. The training was just right and in fact we still have half a day training in hand - we had a few key people trained fully in the system and from there the knowledge cascaded down without problem.

As we had been scanning for some many years we were used to the principle of being paperless, although the reality of never truly achieving a paperless state has long been accepted by us. But by moving to Docman and having access to proper document management features such as electronic workflowing of documents and on-screen commenting, we have seen a reduction in our paper. We now receive a document, scan it and then put the paper aside and it's all done on the pc. At any point from when the document is scanned, if a patient calls, any member of the team can view the document on screen, and will know who it's with, any comments that have been added to it and any actions have been called for by the GP.

For us, using Docman over our previous system does take slightly longer per document, but then we're not just scanning and attaching to a patient record. We now scan, attach, then workflow to the relevant clinician. Although, had we moved from a completely paper based system to Docman, we're sure the time savings would have been considerable. But the improvements in service we can offer to patients and the audit trail of who has seen and done what, has made it an indispensable tool in the practice.

One development we're now investigating is Docman Intellisense, with the aim of further speeding the handling of documents, by automatically selecting the patient from the content of the letter. We're also interested in Docman EDT, receiving electronic documents from our local hospitals, although this will require the participation of the local acute Trusts and we would welcome any developments in that direction.

Comments from some of our users:

"I like it because if I have a gap between patients, I can quickly check my workflow tray wherever I am." - GP

"Training and install were both fine, with minimal disruption." - Admin assistant

"It is great to be able to see exactly who has seen a document and what action has been taken so far." - Secretary