



## Taking the Business Office from Paper to Paperless

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Business offices are notoriously cluttered with paper. On the tops of every desk and file cabinet there are piles of paper. There is mail from patients, mail from insurance companies, reports, mail to be sent out, and sticky notes of accounts to work. Do the piles ever end? How does your staff know what is a priority? How can the productivity of employees be tracked? With the help of Paragon® and Horizon® Business Folder™ (HBF) it is possible to see the tops of those desks again, prioritize work, see and send reports electronically, and track productivity.

The task of going paperless requires an entirely new frame of mind. Most people love holding onto paper. From the very beginning, the project managers must implement a policy that printing is only going to be done when absolutely necessary. It is well worth the effort to work on changing people's habits from printing things to view to viewing electronically. This process also gives room for process improvement and a chance to look at staff duties to see if a re-origination is in order.

Paragon has many tools to make the business office more efficient and paperless, especially when combined with HBF a business office can truly become paperless. A good place to begin is to review your current processes and document of all job functions. This will ensure that no process will be left out during building. When building flow charts of processes make sure they are very specific to each type of account and role. Next, start thinking about how to take these processes and make them electronic. Try to think differently. Start with a few of these ideas to reduce paper in the business office using your McKesson applications.

Paragon Receivables Administrator module replaces work lists or printed reports for patient financial services. This module can send ticklers (an electronic notification to work a visit) to a specific person or queue. You can run an Aged Trial Balance (ATB) from Patient Management and send the report via a tickler to an employee. The Explanation of Benefits (EOB) is available to view in the visit if the payment was posted electronically which eliminates the need for a paper EOB. If the payment is a denial a tickler can be sent automatically.

When closing ticklers you can track things such as:

- Productivity of Employees
- Account Distribution
- The Breakdown of Patient Type, Plan code, or Service Type by Queue or Employee
- Denials/Appeals

Paragon Patient Management module is another place where patient financial services will enhance workflow. In this module, users will be able to look up a visit ID, run ATB's, post all payments, post charges, send statements, and run reports. ATB Reporting is a quick way to build a report to get specific information to the right person quickly. It is possible to run an ATB and send it via ticklers or save it to an excel file and email it to an employee (no printing!). All insurance payments that are sent electronically are posted using Electronic Remittance. No more printing out the EOB's



since the file imports directly into Paragon and HBF. All reports can be saved to an excel file and do not need to be printed.

Horizon Business Folder (HBF) is where the paperless process really becomes beneficial. Scanning all documents eliminates the need for the mail to be passed out and reduces the amount of misplaced mail. The electronic version of the mail goes into queues based on workflow. When multi-patient EOB's are scanned, the program allows users to split the EOB up by visit ID. HBF will put the EOB in its entirety in a DayFolder for reference, but the Patient specific EOB goes to the visit ID. ANSI 835's are automatically split and put to the individual visit ID.

Reports Manager gives you the ability to track:

- Productivity of employees working queues
- Audit Trail
- Healthcare Claim Payment (835)
- Scanning & Indexing Productivity

RightFax is used to fax documents out of HBF and receive faxes into HBF. By using this product all orders can be faxed into a queue for pre-registration to work. This process helps eliminate missing orders. Registration can work more efficiently by using this tool to pre-register all of the orders in this queue.

In summary, if you have taken advantage all of the tools available it is very possible to take the Patient Financial Service's paper use from lots to none. In doing so, your organization will be able to save money in paper expenses. Employees will learn to love not having paper all over their desk and being able to find accounts that they have worked very easily.

For more information about the services and solutions offered by VCS or how we can help you optimize your McKesson solutions, please call us at 610.444.1233 or email us at [vcs@getvitalized.com](mailto:vcs@getvitalized.com). You can also find more information by visiting our website at [www.getvitalized.com](http://www.getvitalized.com).