

CASE STUDY

MONTROSE MEMORIAL HOSPITAL



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Montrose Memorial Hospital (MMH) is a 501(c)3 nonprofit healthcare system serving Montrose, San Miguel, Ouray, Gunnison, Delta, Hinsdale and San Juan counties in Colorado. The health system offers a 75-bed hospital and an extensive range of inpatient and outpatient healthcare services, including cardiology, oncology, minimally invasive surgery, laboratory, medical imaging/radiology and Level III trauma center. MMH is the second-largest employer in Montrose County, with more than 600 employees and 100 physicians who represent 23 medical specialties. The hospital has received patient satisfaction ratings exceeding 90 percent since 2010.

Quick Facts

Location: Montrose, Colo.

Access Products: Intelligent E-Forms, Electronic Signatures, Process Automation

Department: Materials management

Areas: Purchase orders (PO), supply ordering, credit card reconciliation, capital equipment requests

A year after Robert Mims joined MMH as director of materials management, the hospital’s IT director told him that the hospital had purchased Access’s web-based forms solution, but had yet to deploy it. He asked Mims if he could find some paper-based forms processes that could be replaced by fast, electronic workflows. It didn’t take Mims long to find multiple use cases, and he prioritized purchase order (PO) supply ordering for his department.

Transforming Materials Management Processes

MMH has a process built in to its IT system for ordering repetitive supplies, but requesting one-offs was a complex, slow, paper-centric process that Mims said, “required a lot of emailing back and forth and multiple follow-ups for each item.” So he created an electronic form that enables his colleagues to quickly request products, conference seats, travel and more online, with a one-time request.

Another related process involved paying for items with a company credit card. Previously, Mims took time at the end of each month to see who had used the card and reconcile the purchases. “There was no real approval process before we started using the Access system, but now we’ve fixed the process and there’s a lot less legwork at the end of the month,” Mims said. “Everyone loves the new way of doing it.”

Next, Mims turned his attention to MMH’s capital equipment request process, which he said “was very cumbersome.” Each request above a certain amount went to the board members, who signed for approval if they deemed the expense necessary. The trouble was that if one of the approvers was out of the office, they could sometimes not



Before

Requesting one-off supplies was a complicated and slow paper-heavy process for staff.

Reconciling company credit card purchases required extra work with steps that weren't consistent.

Cumbersome capital request process involved shuffling paper forms from desk to desk for approval.

Paper-based forms were difficult to track, creating bottlenecks and workflow uncertainties.

After

Supply ordering e-form empowers staff to quickly request products, travel and more online.

Access web-based e-forms and workflow fixed the hospital's credit card reconciliation process.

Approvers OK capital requests online from home or anywhere else, keeping cash flow regular.

Replacing paper with electronic, web-based e-forms improves accountability and speeds approval.

see the form on their desk. This meant it didn't get the final approval signatures, and the designated money wasn't spent. Once the signatures had been collected, the purchase was often completed the following month or quarter, impacting the budget and cash flow. The Access system has changed all this for the better.

"Instead of a capital request form being forgotten on a desk, we get emails saying we need to provide our signatures," Mims said. "As the Access system provides forms via the web, we can issue our approval from home or anywhere else. This means we're spending money in the same quarter it's designated for purchases, which helps keep our cash flow regular."

Improving Document Tracking

Before moving to e-forms, it was difficult to know who had a certain form and what action was still required. "With paper forms, an assistant might forget to get an executive's signature and the requestor would have no idea where the form was or how long the approval would take," Mims said. "The Access solution means we can keep track of our forms, and if we know a certain person hasn't provided a signature, we can follow up with them directly to get it done."

One of the main benefits of the Access system is the ease and speed of filling in forms, compared with the old paper-based method. Replacing hard copies with electronic, web-based versions has also improved document tracking at MMH, as has the timeliness of forms approval.

"Now that we can open up, fill in and submit forms via the web, we've eliminated a lot of paper," said MMH Systems Administrator Brian Quon. "As the initiator of a workflow, you just fill in the form, sign and submit, and you know it's going to end up with the right person for a quick approval. Trying to get multiple signatures on a form used to take days or even weeks, but now you can do it in minutes."

Going Above and Beyond with Customer Support

One of the factors that has made MMH's e-forms projects successful is the relationships the hospital's staff has developed with Access's support team.

"With any software purchase, there are always similar products offered by several companies," Quon said. "The difference comes down to service, and Access's support is first-class. Instead of dictating what we should do in a certain situation, they kept an open mind and worked closely with me to figure out the best solution for us. That's not the case with most vendors. Access is definitely in the top tier when it comes to technical knowledge, knowing healthcare and customer focus."

"Mims adds, "Once I started working with Access's workflow expert, I became even more impressed with the product and its versatility. If I email him, I quickly get a detailed response. He's helping us get rid of those last bits of paper, which is something any materials management director can benefit from."

MMH isn't standing pat with its web-based forms projects, but is planning to extend Access's system to other departments across the hospital. Mims already is looking

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to take the contract flow process electronic, and is working with the accounting director to transform check approval with an online form.

“We’re looking at several other areas that we believe can benefit from e-forms,” Quon said. “The Access solution is so dynamic, simple to use and easy to manage, that I’m sure there are many other processes that we can improve with it.”



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