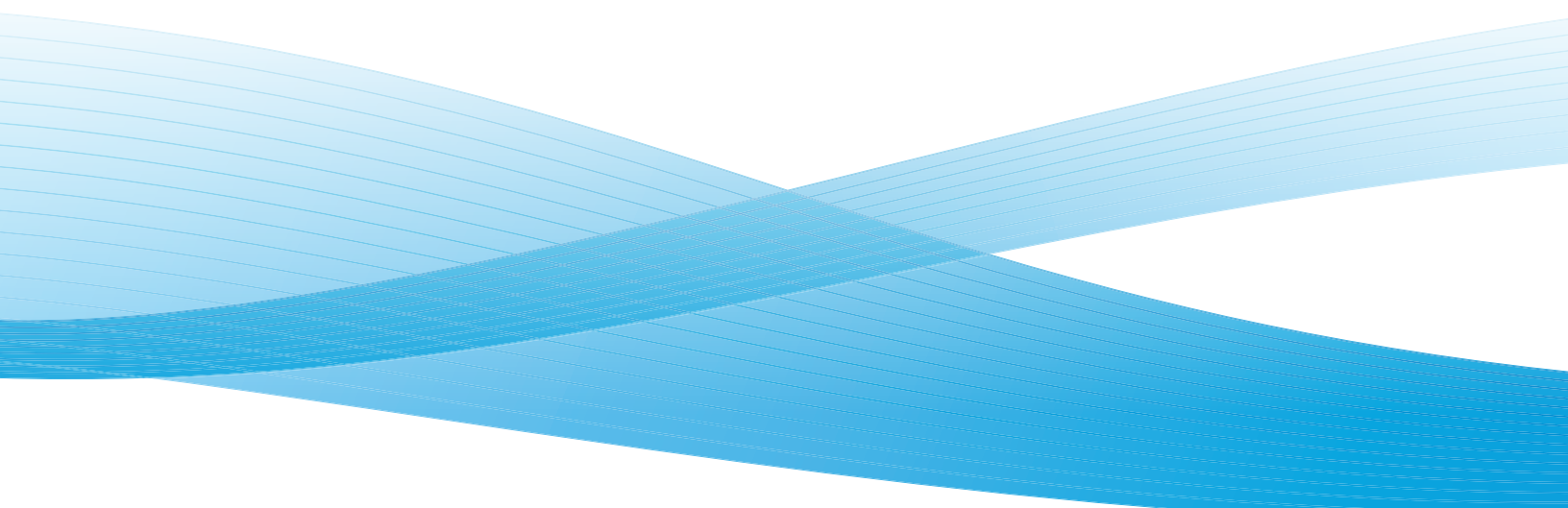


Just in Time Documents

Kaiser Permanente provides basic Web-based document and content services to thousands of intranet users through Xerox DocuShare



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“Does anyone know where the physical coding forms are?” “Yes. They’re in cabinet four near the new admissions forms.” “I already checked there. Those forms are from 2003 – I need the current version.”

“Go check on the third floor – I bet they have them. If they do, be sure to make some copies for us!”

Walk through the halls of almost every one of the Northern California locations of Kaiser Permanente on any given day and you could hear a similar conversation. That’s because the staff handles thousands of documents daily and needs immediate access to the most up-to-date hospital information – for example, in just the medical centers and business units of Northern California, this includes more than 500 medical forms, manuals, brochures, training materials and policy guidelines for compliance with Joint Commission on Healthcare Accreditation (JCAHO), Health Insurance Portability and Accountability Act (HIPAA), and other standards. Access to this information is critical to the management and administration of a hospital.

Like many healthcare systems, this region of Kaiser was reliant on hard copy documents. Each department – like Imaging, Laboratory Science, Mental/Behavioral Health, Nursing, Pharmacy and Physical/ Occupational Therapy – needed access to its own specific forms, as well as those used throughout the organization. Just several years ago, all of these documents were stored in hard copy form within each department. Updated forms often looked the same with only slightly different details, leaving some staff unknowingly working from outdated documents. With no system to keep forms updated across all departments, this created a major versioning problem.

As if that wasn’t challenge enough, staff was spending time on the inventory, ordering, storage, replication and distribution of hard copy documents – time that could be better served on patients.

The hospital was also relying on outside print shops to produce paper manuals and large orders of forms, which was costly as too much was often printed, creating wasted inventory.

Kaiser needed a system to manage documents, so that non-technical people across the organization could publish documents to a Website where they could be made available for browsing or searching. But like most healthcare organizations across the country, they worked with a limited IT budget. In order to justify the expense of a document management system, they had to look for a solution that would reduce costs and increase efficiency, while also considering their most valuable resource – time. A system that required extensive training to implement and use would not succeed with a busy and widely dispersed collection of physicians, nurses and administrators.

As one of the biggest advocates to reform the system and a champion of technology, Dr. David Levy took it upon himself to evaluate options.

Given cost was a primary concern, he quickly ruled out investigating more expensive, complex systems because of their price tags.

Fortunately, it didn't take long to identify DocuShare - Xerox Corporation's secure, Web-based enterprise content management system used for exchanging, managing and publishing information on Websites. DocuShare was already in use by smaller departments in Kaiser's Southern California facilities. The Northern California center chose to expand on its existing use – and they were able to add users in stages to keep pace with user adoption.

The software was easy for busy administrative staff, doctors and nurses to use with very little training, and could be applied to all levels of the organization. A selling point was that its Web-based interface was easy to administer and didn't require users to install client software on their desktops – it was critical that they not be required to re-install software on every client whenever new versions became available. The system was first deployed in the Walnut Creek and Santa Clara facilities in Northern California.

The solution proved simple, yet effective. The IT staff used it to create a main internal Website from which all registered users could gain access. All important files, including regulatory compliance policies and procedures or "P&P's," can be accessed from this central repository. From there, each department has the ability to set up its own DocuShare Website, where their specific forms, policies and procedure documents are stored. Users with no HTML experience can quickly and easily contribute content into the DocuShare page through any browser interface without additional applications or plug-ins.

In most cases, users don't need training. If they're familiar with a basic Web browser, then they have the skills to use the software, which can be as simple as dragging and dropping files into various collections. This tight integration and ease of use has been a noted as a factor in the application's success.

Every document is assigned its own URL, and the system has a 'Guest' feature that allows viewing without login. This Web interface has created an extra benefit - many of Kaiser's internal Websites in California and increasingly across the organization, point to policies, guidelines, forms and other documents stored in DocuShare. People often don't realize they are using the software, as it integrates so well with the Kaiser intranet Website.

Security is a major concern for the healthcare industry as a whole, so it was important for the document management system to keep information safe, yet be flexible for a wide range of users. And the system does just that. When a user starts a collection, he or she can choose whether each document is read only or read and write, or set the ability to delete. Those 'owners' can also determine who has access – from individuals to the entire enterprise. This puts each user in control of the information they post.

System integrators can quickly design custom workflows in the Studio by inserting predefined, DocuShare-specific workflow task objects from the graphical design palette. Software developers can both take advantage of the default functions for standardized tasks, and create more elaborate Java-based custom task objects— Studio's graphical design environment flexibly incorporates both. Using these enhanced tools streamlines the implementation of content-centric workflow processes, allowing integrators and developers to apply more project resources on true value-added activities. Actions that are custom-created in the Design Studio can be readily exported and made available for users to invoke through the content rules authoring wizard.

About Kaiser Permanente

Kaiser Permanente is America's leading integrated health plan. Founded in 1945, it is a not-for-profit, group practice program headquartered in Oakland, Calif. Kaiser Permanente serves more than 8.5 million members in nine states and the District of Columbia. Today it encompasses the not-for-profit Kaiser Foundation Health Plan, Inc., Kaiser Foundation Hospitals and their subsidiaries, and the for-profit Permanente Medical Groups. Nationwide, Kaiser Permanente includes approximately 145,000 technical, administrative and clerical employees and caregivers, and more than 12,000 physicians representing all specialties.

Perhaps one of the biggest side effects of this deployment has been less involvement in accessing content by the IT department. When a user wants access to a restricted document, he or she can easily identify the owner and contact that person directly instead of tying up IT. Patient information is not stored on the system, so while administrators apply security controls when needed, HIPAA regulations don't apply.

Kaiser has eliminated outdated forms using the software's versioning controls. When a static document is saved, permissions are set by the owner to keep it from being altered. Each time a form is accessed, the staff is confident they're using the most recent version and everyone has more time to work on more critical tasks.

DocuShare also compliments Kaiser's culture of geographically distributed teams. Since it is Web-based, different locations can all access the same server and share information. Administrators and medical professionals across the integrated healthcare system can use this internal tool to instantly print and exchange the latest versions of policies, specifications, and other documentation.

After an initial departmental installation of several hundred users, DocuShare use spread quickly. In less than two years, more than 5,000 contributing users have been added into the system, with at times up to 100 users added each week. Additionally, all 8 regional centers across Kaiser, with an estimated 30,000 people, can now access certain documents in the DocuShare system through the "guest" feature that allows people to view, download or link to a stored document without login. The costs savings – including time saved and reduced printing costs – was estimated upon implementation to be \$500,000 per year at the two original locations. With use spreading beyond the original Northern California centers planned, benefits are now available to a broader part of the enterprise. Most significantly, the time saved by staff and the peace of mind that has come with version control has made the solution a success.