Document Generation in Patient Relations and Risk Management

Let us help you focus your attention on the opportunities MIDAS+ Document Generation provides. In this session we will show you how using the Care Management Document Generation solution allows you to implement a paperless referral and follow-up process. Come see how easy it is to create professional and formal letters addressed to patients, payers, and legal counsel, using data that’s already in your MIDAS+ system.

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Objectives

• Understand the use of Document Generation from the perspective of Patient Relations and Risk Management

• Identify the appropriate use of ReporTrack Reports vs ReporTrack Documents
Don’t be Afraid

ReporTrack vs Document Generation

ReporTrack
- AdHoc Reporting Tool
- Intuitive graphical interface contained with the MIDAS+ Care Management product
- Tabular listing and worksheet-style reports
- Automatic detection and correction of unwanted duplication
- Custom formatting
- Output to screen, printer, file or Excel
- Standard preview and HTML browser preview
- Report Scheduling
- Compatibility with existing SQL technologies
ReporTrack vs Document Generation

Document Generation

• Letters & documents are available to most Care Management modules
• Users can select any available field, including multiple fields
• MS Word has been integrated with existing ReporTrack functionality
• Documents and document groups can be sent to patients, non-patients, employees, providers and contacts that appear in many modules
• Documents can be tracked to include the date a document was sent, to whom and which document. A copy of the generated document can be saved

Document Generation (continued)

• Documents can be combined into groups to allow multiple documents to be generated at one time
• Documents can be “linked” directly to a module in Care Management or can be made available from within User Report Processing
• Documents are tracked in a Document List to maintain a history of documents generated
Patient Relations

Regulatory Considerations
- Maintaining Documentation
  - Has already begun by RDE
- Timeline for Resolution Letter (7 days)
- Timeline for Acknowledgement Letter (Includes expected resolution date)
  - Extended User Fields
  - Manage timelines utilizing follow up date in STW definition
  - Utilize referral grids in Pt Relations or Risk Management

Patient Relations
Attached Files

Might Include:
- Letter from Patient/Family
- Survey Reply w/Comments
- E-mails
- Handwritten Notes from Telephone Call
Document Generation Overview

Define a document:

• Start ReporTrack
• Add a new linked or unlinked document, give it a name, and choose the document type
• In a linked document, data sources are automatically selected for you. You may add additional sources as needed

• Add your data fields and column collections (if needed)
• If necessary, modify the document text and layout so it appears the way you want it to
• Selection criteria are optional
Document Generation Overview

- If needed, add the formula criteria for the data displayed in the document
- Compile and preview the document
- Save your work and consider whether the document should be made available from User Report Processing

ReporTrack Documents
Document Options

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Patient Relations Document Generation Definition

18th Annual MIDAS+ User Symposium • June 1–3, 2009 • Tucson, Arizona
Patient Relations Event

Staff Completes RDE

18th Annual MIDAS+ User Symposium • June 1–3, 2009 • Tucson, Arizona
Event Populates on SmarTrack Worklist

Patient Relations Documents / Files Buttons
Patient Relations
Options for Attaching Files

- Import documents from your PC or any folder on your network
- Scan if the information is from an external source

Attached Files

+ Sign Indicates Files are attached
Extended User Fields to Track Dates

Options for Documents

Generate Single Document
Generate Document Group
Documents Generated
Generate Single Document

ReporTrackDocument

Generate Document Group

Envelope & Letter Generated
Documents Generated & More

SmarTrack Worklists

• Manage timelines with SmarTrack Worklists
  • Follow up date: X # days after

• Patient Tracking List for unresolved complaints
Create Custom Risk Worksheets using Document Generation

Risk ReporTrack Report Tabular Listing
Benefits of Document Generation

- Easy to create
- Looks professional
- Option to generate the document from within the associated MIDAS+ function
- Copy stored in associated patient episode in MIDAS+
With
Document Generation

Go From This  To This