PROFILE

The College of Physicians & Surgeons of Alberta (CPSA) has regulated the practice of medicine in Alberta since 1905. Services provided include physician registration, accreditation of health facilities, clinical review, investigation and resolution of physician-related complaints, contribution to public policy affecting health care delivery and guiding professional conduct and ethical behaviour. The CPSA is governed by a Council that includes physicians, public members and representatives from Alberta's medical schools.

CHALLENGE

The CPSA used a paper based, decentralized filing system where each business unit retained their own physician member files. The instance of duplicate documents was very high and there was no real version control. There were approximately 6,300 active physician files, with 1,000 applications for membership per year and 500 registrations per year. The CPSA had a custom built electronic database system that contained the tombstone information for each registered physician. In-house technical staff maintained and supported this database.

SOLUTION

CPSA desired "a single source of truth," where information could be consolidated in one place and accessed easily and quickly at any time. They were also seeking methods of processing document flow through the office more effectively and efficiently. This led to the consideration of imaging and Enterprise-Wide Electronic Document Management Technologies. The CPSA was looking to collaborate with an experienced organization that would assist in selecting the best product and approach to effectively meet its objectives.

RESULT

More than putting files and documents into electronic form, this project made the CPSA more efficient and effective in their work. It provided them with tools to enhance their work, made that work easier to do, and helped to integrate processes across departments.

College of Physicians & Surgeons of Alberta

Approach

Consentia met with the core CPSA team responsible for this project, who provided a general overview and had the opportunity to articulate a broad view of how the CPSA functions – identifying the 'big box processes' that illustrate what the various units do and how they relate/ interact with each other.

Members of the Consentia team interviewed key staff in the various business areas to analyze the current, "as is" situation and determine the requirements necessary to achieve the desired state.

The results from the analysis work and general requirements helped develop recommendations for going forward with an imaging and content management solution.

Consentia took note of the various dependencies of, and between the business units, and also analyzed and made recommendations for a back file conversion approach.

The proposed approach was developed to address the particular requirements of this project – respecting objectives, timeline, constraints, scope, and intended implementation approach. This approach allowed Consentia to meet the timeline and to keep the project costs well in line.

> **"Having electronic files has enabled us to have more than one person looking at a file at the same time and even from different locations, it also gives us the option of working remotely thus saving us enormous time and resources ."**
>
> **- Bruce Leisen**
> **Director, Registration**

The analysis began by looking at the current environment and business practice. Consentia interviewed members of each business function area to:

- Examine the existing flow of external documents at the front end. This encompassed the flow of documents from the time they enter the office, including the various methods for their entry into the office, to the time they are placed on the paper file.

- Examine the flow of files and other documents within the office. This included the flow of documents between the following Business function areas:
  - Complaints/Investigations
  - Registration
  - Operations
  - Communications
  - Physician Prescribing Practices
  - Quality of Care
  - Research Ethics

- Identify why documents are retrieved, how often they are retrieved and who retrieves them at various times during the lifecycle.

- Analyze the interaction and contention between various areas of the office for access to the paper file.

> **"We have been able to streamline work processes using electronic files by having the ability to have multiple steps happen at the same time"**
>
> *- Bruce Leisen, Director, Registration*

Benefit

This project enabled the CPSA to create an electronic profile for each registered physician. Profiles included all documents, emails, phone calls, stored data, plus a list of recent tasks and events associated with each physician. This summary of information functions as a single source of truth about that physician. This has allowed the creation of a valuable resource for all CPSA staff.

> **"File lookup is now instant and searching the specific file is also almost instantaneous."**
>
> *- Bruce Leisen, Director, Registration*

These physician profiles improved CPSA customer service. Staff members were able to respond more quickly and consistently to external inquiries. The profiles also enable better sharing of information. Now multiple users can access the same electronic documents at the same time. Hard copy files are no longer "lost" or "missing".

This project also developed team sites, work queues and work flows. Other benefits included the creation of audit trails, streamlining of internal mail processes and

> **"We now always know exactly where the file is, no more looking for a physical file around the office."**
>
> *- Bruce Leisen, Director, Registration*

the ability to access key information remotely.

Expanded Scope

Now that the Registration Department is completely electronic Consentia continues to assist CPSA go paperless by digitising files in other business areas as well as assisting to expand the in situ imaging initiative .

CONSENTIA
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