

Case Study: King's College Hospital redesigns their outpatient referral process with Docman RMS



As part of its Outpatient transformation programme, Kings College Hospital has implemented Docman RMS for the electronic management of referrals. The Trust vision at the outset of the project was to create a fully electronic referral management process that delivered increased administrative flexibility and efficiency whilst retaining current levels of granularity in clinical decision making.

The Trust's objective was to redesign the outpatient referral process as part of a wider strategy to become paper-light.

The project addressed the following issues:

- Wide variations in the time taken from receipt of referral to appointment booking, creating pressures in achieving Referral to Treatment time targets
- Varying processes for receipt, logging, grading and appointment booking, resulting in the need for a high degree of local specialty knowledge
- Considerable effort by administrative teams in tracking referrals and dealing with queries
- Inconsistent information available for managing patient and GP queries and for reporting on the referral management process
- A higher than desirable level of patient complaints and PALS enquiries regarding referrals.

The objectives of the project were therefore to:

- Standardise administration processes for referral management and improve essential data capture
- Enable the re-organisation of administrative teams whilst retaining clinical decision making
- Improve service efficiency through the provision of an electronic referral management process
- Improve the patient and GP experience

King's is the first Trust to deploy Docman RMS.

The solution provides the same level of flexibility and functionality as the Docman system does for the 5,500 GP practices in primary care as it does for an NHS provider's referral management system. Intelligent data capture tools, one click workflow philosophy, comprehensive audit trails and an easy to view system ensures the platform delivers demonstrable benefits. Workflow quick steps, combining commonly performed tasks into one click, ensures flexibility of the software for clinicians and delivers maximum time savings.

The project objectives were to improve quality and improve the patient experience. It is a typical problem in the NHS for managing incoming referral letters electronically which are received through a variety of sources such as fax, Choose and Book, email or through the post.



The project provided:

- A central repository for electronic copies of all referrals, regardless of their source, which results in a reduction in time spent tracking letters/managing queries. This reduces patient complaints and the Trust operates in more consistent time scales.
- The ability to electronically transfer copies of referrals from Choose and Book and referrals received by email and to create digital images of paper referrals. This provides a single source to manage incoming referrals and quickly capture them using intelligent software tools, estimated to save three minutes per letter. This reduces validation effort and ensures the data is right first time.
- A flexible and highly configurable workflow tool to allow clinicians and admin staff to tailor and track the referral grading and booking process according to the needs of individual specialties. This streamlines the approach for managing urgent referrals and also provides ease of access to information when responding to patient queries.
- A means of keeping an electronic record of all activity related to the management of each referral, commencing at the earliest possible point in the process and providing a comprehensive audit trail. This improves the consistency of referral data for RTT management.

Docman RMS has ensured that patient referral turnaround is a lot faster and that documents cannot be lost or misplaced. The Trust is now completing referrals within hours rather than days, meaning that patients have the information faster and there are fewer phone calls enquiring about the referral status. The electronic system also means that when patients do call for information, it is readily available to staff who can quickly provide an accurate update from the detailed audit trail of activity.

Previously, it was impossible to know where the document was in the process, or even if it had been received.

This streamlined approach, without the need for local knowledge, has ensured the most appropriate pathway is chosen and a reduction in inappropriate or misdirected referrals.

The successful implementation of Docman has been key to achieving benefits in the following areas:

- The achievement of standardisation of referral management processes, including a reduction in timescales from receipt of referral to appointment booking.
- Administrative teams have been re-organised to enable teams to cross cover, allowing resources to be allocated according to demand within the specialty, a major factor in achieving the improvement in booking times
- Improved patient and GP experience
- A reduction in patient complaints and PALS enquiries relating to referrals

Service efficiency was improved as a result of:

- The audit trail reducing the effort in providing information to manage patient queries
- A streamlined process for managing urgent and 2 week referrals
- An overall reduction in the number of handoffs throughout the referral and booking process
- Reducing the effort required to track paper through the organisation
- Fewer appointment cancellations resulting in better use of the Trust's outpatient capacity

The implementation process involved the mapping of patient care pathways, resulting in the standardisation of referrals without the need for local knowledge. This increased the accuracy of delivering referrals to the right department quicker than before by reducing the time from receiving the referral to booking an appointment.

The improved process in the Trust of managing referral letters has enabled them to process them quicker, provide information to patients with ease and has generated time savings for up to 200 staff.

