



## Forms Inventory and Management Program

- Tackles the daunting task of organizing and inventorying all hospital forms
- Ensures all forms meet best-practice standards for electronic record implementation
- Identifies gaps and weaknesses in control and management of medical records
- Empowers the HIM department to maintain an effective forms management program
- Ensures the highest levels of efficiency and productivity in record processing

Maintaining control and accuracy with hospital forms is critical for meeting Legal Health Record (LHR) requirements. Full reimbursement and compliance are dependent on the flow of essential and timely information. Forms Management consultation from H.I.Mentors helps ensure that your forms are inventoried, categorized and controlled to enable EHR readiness and support maximum efficiencies in workflow, security and access.

*“When we knew we were going to make the switch to Electronic Health Records from our paper based system we called in the H.I.Mentors team to help us develop a plan to make it happen smoothly. The first step of their consultation was to conduct an extensive forms inventory. This inventory was very thorough and a critical first step in organizing our forms to ready them for the transition to EHR.*

*During the process we categorized and identified numerous forms that needed revision to allow them to be properly scanned and filed electronically for multiple facilities. This process helped us organize and streamline our forms and allowed us to get our arms around all the different forms various departments were using on a daily basis”.*

*Terri Krevey, RHIA, MHA  
Director, Medical Record Services  
Mercy Hospital  
Scranton, PA*

## Collecting

The first step in the forms inventory project is to collect and catalog all forms and their identification data or fields. Many factors contribute to the multitude of forms in a hospital including: departmental preferences, inconsistent forms creation standards, accreditation and legal requirements. It is easy to see that categorizing, numbering and bar-coding new and revised forms is a never-ending task. Key Collection Services include:

- Organizing and conducting a forms meeting with key department managers
- Outlining clear goals of improved forms management
- Assigning individuals in each to department to begin collecting and organizing forms
- Visiting each department to conduct a physical inventory and forms review

## Ask Yourself:

Do I have an extensive, all-inclusive inventory of every form in the hospital? Can rogue forms appear due to “PC creation syndrome”?

Do I have a process in place to delete, add or revise forms as needed?

Are all my forms EHR ready with unique identification and names?

## Categorizing

Once all forms are inventoried, a comprehensive procedure of categorizing each form is completed. This categorization is key to effectively managing the forms moving forward and accurately interfaced to the Electronic Document Management system. Key Categorizing services include:

- Assigning categories and subcategories by form type and service
- Assessing the need to redesign or delete each form
- Inspecting each form for EDMS readiness and format
- Creating a detailed master list of all

forms by type and department

- Reviewing with each department the changes/revisions needed on their particular forms
- Recommendations on eliminating unnecessary or duplicate forms

Once we have categorized, eliminated and identified every form the hospital uses, we can set about initiating the changes that were identified. This may involve various department managers or directors, clinicians, vendors, IT and the print shop.

## Ask Yourself:

Is every form clearly categorized for easy identification, location and required changes?

Are all my forms EHR ready?

Do you have duplicate or redundant forms?

Do some forms need revision, update or clean up?

Do I have a clear process outlined managing my forms program in the future?

## Controlling

Equally important in the Forms Management Program is the “Control” factor. Putting in adequate controls guarantees the project will meet and maintain its objectives for years to come. Doing this provides a detailed process for forms development and design, maintaining consistency, accuracy and compliance. All new forms will meet predetermined guidelines, ensuring data integrity and smooth integration with your EHR solution. Key Controlling Services include:

- Clearly written policies and procedures for maintaining forms in best-practice fashion
- Meeting with each department to define, train and implement acceptable forms management practices
- Providing tools to assist with ongoing forms management and eliminating forms that are no longer necessary

When the consultation is complete. HIM and other key departments will have all the necessary tools, rules and training to effectively manage the ever-changing challenges of Forms Management required to implement and maintain a legal health record.

## About H.I.Mentors

H.I.Mentors is a Health Information Management and Revenue Cycle Management consulting firm founded by nationally recognized health information management leader Darice Grzybowski, MA, RHIA, FAHIMA. H.I.Mentors employs leading industry experts with decades of experience who provide focused consulting programs that simultaneously help improve compliance, motivate staff, mitigate risk and reduce costs for facilities. Our hands-on mentoring approach helps HIM and Revenue Cycle departments improve their operations to help you optimize performance and improve your bottom line.

*The challenges along the eHIM continuum are many. Our expertise can help ensure your success and smooth transition as you migrate toward the EHR.*

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