



## FileVision Improves Case Management Review Process for South Florida Utilization Review

*Information Relationship Management System improves medical case management reviews, auditing and physician credentialing for utilization review company*

### Customer Profile

In business for more than 20 years, South Florida Utilization Review (SFUR) provides and performs physician advisor level utilization review for a number of insurance carriers and external peer reviews for hospitals. SFUR employs over 120 physician advisors in Florida, the southeastern United States and Texas, who are board certified in their specialties and as workers' compensation providers. SFUR has reviewed tens of thousand of cases, with a ten working day turn around for retrospective reviews and a five working day turn around for rush reviews. South Florida Utilization Review is managed by Dr. Joel Grossman, M.D., President of SFUR, Certified Medical Audit Specialist and Certified Professional Coder.

In our interview with Lizet Pla, office manager for SFUR, we discussed the type of software solution SFUR needed to improve their efficiency and profitability, their decision to purchase FileVision and the benefits they have gained. Lizet works from an Atlanta branch office and connects to the FileVision server located at SFUR's headquarters in Coral Gables, FL. The SFUR team uses FileVision to track and manage case reviews and turnaround times of the cases being reviewed by Dr. Grossman and their panel of physicians. Key members of Lizet's team include Vanessa Perez, Assistant Office Manager and Jessica Lopez, Data Entry.

### Business Case

Before choosing FileVision, SFUR used a custom-designed program for tracking cases. The software did not handle document management, imaging or workflow. Plus, it was old and outdated and did not automate any processes, it simply held the data.

SFUR needed a solution to help them track the stage of cases. For example, cases being processed, assigned to doctor for

review, which doctor the case was assigned to and so forth. Additionally, perhaps just as important to their productivity and profitability, SFUR needed a solution to digitize paper documents, store them together with computer-generated documents in one central repository where they were linked to the data for each case. Finally, they needed workflow to help them better manage the entire case review process.

According to Lizet, "I was introduced to FileVision by a colleague, saw a demo and knew immediately FileVision would meet our current and future needs. I spoke to Dr. Grossman and the rest of the team and we all agreed we had everything to gain by switching to the more comprehensive FileVision solution."

### Solution

Since implementing FileVision, SFUR spends less time looking for case files and details they need to complete the review process. Each case is available at their fingertips with easy access to patient records, documentation, physician reviews and notes, the entire status of a case from open to close. "We spend so much less time looking for case files and information we need to do our jobs", stated Lizet.

As a new case comes in, the SFUR administrative team enters the data into a written log, where they gather the paperwork and information and sort everything by client. Once the paper documents are collected, SFUR creates a new patient case using the case information in the FileVision relationship management module entering name, contact information, medical problem, and physician assigned to the case, creating a complete record for the case. The related documents are scanned and linked to the patient case record in FileVision, bringing everything into one central repository for tracking and completing the reviews.

The case is then pushed to Dr. Grossman's FileVision Notice Board with the questions to be addressed by the assigned physician. Dr. Grossman prepares the case for the physician and

dictates a narrative on the case, such as what happened to the patient and why the case was brought for review. The case is then assigned by Dr. Grossman to a case manager and that person becomes responsible for tracking the progress of the review.

The case manager sends the case to the physician for review. The physician reviews the case and phones in answers to the questions proposed by Dr. Grossman. Once the doctor completes his review and returns the file, the SFUR team plugs the answers in to the narrative originally dictated by Dr. Grossman. When all the steps are completed, the entire case is presented to the insurance carrier.

Each of the doctors have a preference as to how they wish to receive the cases. Some want to receive cases by fax, others by email. Most prefer to review them online using the computer. If a file is too large to email or fax, the files are printed and sent overnight delivery to the physician. FileVision accommodates any preference the physicians have for receiving the files.

## Benefits

Lizet says, "FileVision has been very helpful for me because I work from the Atlanta branch. Vanessa, Jessica and Dr. Grossman are located in Coral Gables. Previously, if Vanessa or Jessica were away from the office and I needed information on any of the cases I had to wait until they returned to the office, which put me on hold. Now, with FileVision, I simply log in, review the documents for the answers I need and complete my report. There's no down time. This has improved my turn around time immensely."

Another huge benefit is how FileVision handles rush cases. Rush cases have a three day turn around time. When a high priority rush case comes in, FileVision triggers a workflow that places the case at the top of the to-do list. Rush cases are always handled within the three day turn around and FileVision reminders make sure nothing falls through the cracks. The FileVision workflow tool also keeps team members informed of what stage of review a case is in at any given time. This means SFUR never loses track of a case's status and consistently maintains the integrity of their review process.

Another major benefit of FileVision is the facilitation of SFUR's annual audit of accreditations (board certifications) for the physicians on their panel. This is important because they are audited annually at fiscal year end. The oversight committee also randomly conducts onsite audits throughout the year. Previously, it was hard to track the renewal of licenses to make sure physician's credentials were current because this was an entirely manual process. They manually sorted through all of the physician files and checked to see if any physicians needed to be re-credentialed. Consequently, they were never really up-to-date. Now the physician's credentials data has been entered into FileVision to be tracked. Automatic reminders are triggered off of the renewal date which notifies SFUR before expiration. This

keeps them up-to-date at all times and means the difference between passing or failing their year-end audit and receiving their license to continue doing business.

"Using FileVision has greatly improved our productivity and efficiency", stated Lizet. "Turn around times have decreased immensely." They now have a running history of all activities associated with a case because they have a place to enter notes about each task such as phone calls or any communication between parties about any issues that arise. Before the SFUR team wrote out notes about communications and tasks by hand and tried to keep those notes with the paper case file. If the notes were accidentally thrown out or misplaced, the history of their activities was lost, which often meant they had to redo tasks that had already been completed. Extra phone calls and additional communications add up to lost productivity.

## Implementation

FileVision was installed at SFUR on a Monday morning and the 1st training session was conducted that afternoon. They were up and fully running within a week.

## Future Plans

In the future, SFUR plans to scan copies of the physician's credential documents into FileVision to show physical proof that their licenses are up-to-date when an on-site or year-end audit occurs. This will make audits easier and smoother, saving time.

## About FileVision

FileVision is a global software company that develops information relationship management software. Our solution, FileVision, empowers organizations to bridge the gap between digital content and paper documents by intelligently linking and matching documents and information to important objects such as people, companies, processes and assets. Government, healthcare, financial services and many other organizations worldwide rely on our technology to help them improve communications, enhance customer service and immediately access information and relationships within data. FileVision is headquartered in Atlanta, GA with offices in the UK, Australia and New Zealand. For more information, please visit [www.filevision.com](http://www.filevision.com).

## FileVision Benefits

- Automated case management from open to close
- Cost reductions associated with access to and retrieval of information
- Improved turn around times
- Enhanced workload balance
- Better reporting and annual auditing
- Physician certification tracking



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