

INTEGRA CASE STUDY:

Legacy Consulting Pharmacy

With a recent update to DocuTrack 6, North Carolina-based Legacy Consulting Pharmacy found themselves in need of new ideas and guidance for updating their workflow processes and best practices. Executive Manager Darrell Holland and Staff Pharmacist and long-time DocuTrack user Carl Capps spoke to us about their experience with Integra's Consulting Services.

WHY DID YOU NEED CONSULTING SERVICES?

Darrell: "We needed some direction and new ideas, and someone who could educate us on all the possibilities. What I wanted most was to bring in best practices, and instruction for us on the options and why one way is better than the other. So it was really bringing in a fresh face that had seen other successful procedures to come in and help guide us."

Carl: "Also, we were at an impasse with different opinions on how DocuTrack should be set up and what would be the best practices in our use of DocuTrack. We started using DocuTrack around 2003 or so. It wasn't long after that we started building off of it and adding documents and search folders, but not really making a whole lot of structural and process changes.

"As we grew, a lot of people looked at DocuTrack and said, 'Well, we need to make a few changes because some of these features we're not using.' People had some ideas for new procedures and processes, so with our upgrade to Version 6 we thought it'd be a good time to go ahead and clean our DocuTrack up a little bit, streamline it, incorporate everyone's ideas, and make our processes a lot more functional for everybody."

WHY DID YOU CHOOSE TO USE INTEGRA'S CONSULTING SERVICES?

Darrell: "I got a visit from Jim McDonald and Louie Foster, and they suggested we get in contact with Integra's consultants. Integra sees a lot more pharmacies than we do and can see what other pharmacies are doing successfully. Our workflow was designed when we were fairly small, with less than 25 facilities. Now we have 40-something facilities that we serve. We'd really outgrown our original workflow, so needing a workflow overhaul was part of our decision to call Integra."

Carl: "And who else knows the DocuTrack better, and the best ways to utilize all its functions and capabilities?"

CONSULTING

PHARMACY STATISTICS

Pharmacy System:
Frameworks LTC

Markets: LTC

Founded: 2002

Integra Products:
DocuTrack, DeliveryTrack,
eRx Module

"We needed some guidance and new ideas, and someone who could educate us on all the possibilities."

"I think [using Integra Consulting] was the best thing we could have done for ourselves."



DO YOU FEEL THAT YOUR CONSULTING EXPERIENCE WAS VALUABLE?

Darrell: “From my end, I think it was the best thing we could’ve done for ourselves.”

Carl: “The biggest benefit for us was Evelyn’s willingness to engage all users to find out their needs within DocuTrack and how workflow could best be set up to help all departments. Evelyn’s ability to engage all involved was instrumental in our implementation of the new format. She was very considerate to everyone in the process and was very diplomatic in explaining what could be best for operations as opposed to what individuals wanted. She moved us forward in the process and engaged both sides to offer effective solutions to the things that we were trying to accomplish.”

HOW WAS YOUR EXPERIENCE WITH INTEGRA’S CONSULTANTS?

Carl: “It was such a pleasure working with Evelyn. She was extremely knowledgeable in DocuTrack’s functions and capabilities. Evelyn very capably explained the Best Practices within processes and how we needed to adhere to them so that we could manage all documents and make them easier to find with minimal effort. She explained why it was necessary to have different document types and why we should correctly identify them.

“We talked many times during the day, after hours, weekends; anytime I needed to talk to her she was available. And she said never to hesitate to contact her. If she could do anything for us, she’d be glad to do it. With the implementation part, she said she would work on it for us, but the main thing she did at the end was just get us over the changeover from the one format to the next. She was very helpful with that.”

DID CONSULTING HELP YOU ACCOMPLISH YOUR GOALS?

Darrell: “Absolutely. No question about it. Evelyn helped us get over a lot of bumps, and helped smooth out processes that we were struggling with.”

Carl: “We now have a streamlined DocuTrack since we changed or removed many of the unnecessary document types, departments, and queues. Evelyn also suggested the use of static barcodes and routing rules to move documents along the process which meant minimal intervention by our staff.”

WHAT WAS THE MOST BENEFICIAL ASPECT OF USING INTEGRA’S CONSULTING?

Darrell: “And you need to remember that while Carl was actually making the changes, Evelyn was on phone with him at least weekly, and she was quick to respond to us and help get us through hang ups.

“And again the diplomatic approach to bringing all departments together, that was a huge hurdle for us, helping explain to all departments why this is the best way to do it; she helped people get over their fear of change.”

Carl: “The most helpful thing for us was Consulting got us out of a stalemate that was preventing us from moving forward.”

“[Evelyn and I] talked many times during the day, after hours, weekends; anytime I needed to talk to her she was available.”

“We now have a streamlined DocuTrack.”

