



T H E   W E S T O N   G R O U P

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## Reliable IT Services & Solutions

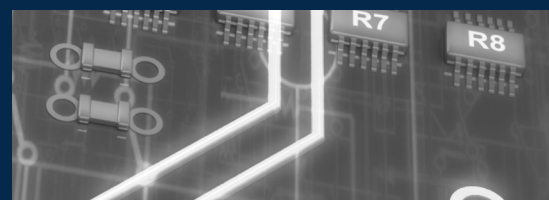
for the

## US Healthcare Industry




*THE POWER OF A SYSTEM . . . THE RELIABILITY OF PEOPLE*

w w w . w e s t o n . c o m



# Operational Automation

The Weston Group began exploring a relationship with then, Network Automation, in 2012  AutoMate to utilize their Automate suite of products for automation. In early 2015, The Weston Group became a partner of Help Systems, now owner of Automate.

In a healthcare environment where risk is shared through various mechanisms, operational excellence is not a luxury. It is required and in fact many of the risk bearing models require a reduction in variety of services which make operational automation more feasible. This is to say that, for example, a physician who is bundling services and only now doing hip implants has a tremendous opportunity to streamline and automate that process from initial evaluation through follow-up.

## Benefits of Operational Automation

### Reliability

When a process is automated, the resulting automation is more secure, operationally, than a human. Consider the reliability of robots on an assembly line.

### Expansion (cost savings)

Although clearly, every automation which replaces human activity can result in cost savings, it is recommended to see the improvement as an opportunity for expansion. Does it allow more with less?

### Improvement

Once an automation is instantiated, it may be easier to improve that automation or increase the integration with other parts of the process over time. The function

## Areas for Automation Consideration

### Clinical

While EMR's are required for coordinated care, analytics, regulatory compliance, etc. their current states do not provide speed increases. However, having this tool in place now allows for automation to speed operational aspects for physicians and staff.

### Operational

There may be opportunities in patient intake, registration, RCM, month end processing or other areas to automate workflow. The prime areas are those which are performed by a lot of people or which require extreme focus by high worth employees (administrator or management).

### Information Technology

IT is a good place for automation as much of it deals with computers, by definition. Backups, file migrations, ETL are examples can be automated with Automate.

## Engagement Process

It is proposed that a small pilot project be developed to test the working relationship and results. This might be found by considering significant operational problems.

After a pilot project, larger projects may be performed via various models including employment of success fees.

## Beyond Operational Automation

It is recommended that if you have a need to go beyond operational automation and make significant gains through automation, the automated solution should become adaptive. It is recommended that you visit the **Unicist Research Institute** as they are the world leaders in Adaptive Systems.



### Additional Information

<http://www.westonhit.org>  
<http://www.networkautomation.com/>

# Automated CPS and Patient Portal Linking

## Potential Benefit

It appears that the time to link each patient is about 2 to 3 minutes. In a practice of 500 patients to link per week, the time spent linking patients is almost 17 hours per week, of clerical time. This is approximately 1/3 of an full time employee.

## Engagement Process

The first step is to analyze the existing workflow to determine the correct filtering of patients to be linked along with any possible issues that might arise.

The end solution is comprised of a custom automated solution built by The Weston Group residing on top of the Automate platform. This requires a dedicated machine to run.

## Automate

Automate was designed for operational and IT automation solutions. As The Weston Group spans both Healthcare IT and traditional IT services, this solution was identified to solve this operational problem in physician groups.

While this tool is initially used for this linking scenario, it is open to be used for any automation activities. Please consult a Weston resource about other opportunities.

## General System Requirements

### Operating System

Windows Server 2003 SP2, Windows Server 2003 R2 SP2, Windows Vista SP2, Windows Server 2008 SP2, Windows 7 SP1, Windows Server 2008 R2 SP1, Windows 8, Windows 8.1, Windows Server 2012, Windows Server 2012 R2

### Processor

Minimum 2GHz Intel or AMD Processor, Recommended 3GHz multicore or faster

### Memory

Minimum 4GB, Recommended 6GB or More

## Situational Overview

Recently, Surescripts ES (formerly Kryptiq) product Automated Clinical Messaging (ACM) introduced a forced requirement for patient portal accounts to be linked to their chart prior to sending clinical visit summaries (CVS). This change appears to be primarily security-focused and related to Meaningful Use stage 2 (MU2). When this change was implemented, ACM CVS documents sent to patients significantly reduced due to the linking requirement (patients were not linked to their charts).

Further review lead indicated that the previous method for patient linking (sending PIN numbers to patients and asking them to register) produced relatively low link rates.

Generally, staff access the patient portal administrative features and manually verify/add patient portal accounts for each patient visit to ensure that their account was linked in time for their office visit (and subsequent CVS) completion. This is the only identified method to ensure that the patient will receive their CVS and the physician's to receive MU2 credit for the patient visit.

The Weston Group developed a solution in conjunction with the Automate automation tool to accomplish this task in an automated and reliable way.



Filter criteria are used to determine what domain of patients needs to be considered for linking. These can include appointment and other criteria. Then algorithms process the patients based on matching demographics to ensure the right patient is linked. Lastly logging is available to see what has happened.



## Additional Information

<http://www.westonhit.org>  
<http://www.networkautomation.com/>

# IT Services

The Weston Group provides various IT services to the US Healthcare industry. Tailored and ala carte usage combinations are available from our services including:

## **Help Desk** (24 x 7 response)

## **Infrastructure Maintenance and Management**

- Network
- Servers
- Desktops
- Telephony for small offices
- IT Physical Plant

## **Application Support**

This might include PM, EMR, PACS, or other clinical/operational systems. The minimum possible is that Weston staff work with the vendor in an informed way to resolve problems. The maximum is when Weston is familiar with the system and can advise on ways to improve operation. The outcomes depend on the system and context.

## **Application Development**

- Full Solutions
- Integration
- Reporting

## **Procurement**

## **Consulting**

- Workflow Analysis and Improvement
- Assessments
- Meaningful Use
- System Selection and Architecture
- Data Extraction

## **Staff Augmentation**

Augmentation might take place on a short or long term basis. High level or low level staff with various skill sets might be involved. And it can be periodic or sustained over the time period. It can also be adaptive in allowing the scheduling to take place based on need.

# IT Solutions

The Weston Group extends the general services offering to include specific solutions based on special technology, niche needs in the market or specific longer term successes. These include:

## **Turn-key IT Outsourcing**

For large physician groups or other medium size hospitals or ancillary providers, the Weston Group can propose an all inclusive solution to outsource all IT services. This can include full or partial acquisition and evaluation of current staff and/or replacement of resources.

## **Turn-key Physician Time Share Offerings**

As facilities continue to develop relationships with the community of physicians, one powerful tool is the timeshare office. Management might provide a space for multiple physicians to use over the course of a month allowing them to work with the facility and broaden their market.

## **Automation of Isolated Processes**

This utilizes workflow analysis to determine possibilities and can use an advanced tool to instantiate the activity. The resulting automation is both reliable and allows more to be done with the same resources. Areas for improvement include:

- Clinical
- IT Operations
- Organization Operations

## **Security Vulnerability Assessments**

A highly objective automated tool tests and evaluates the network and equipment for vulnerabilities. This assessment may include an expert analysis after results to review and propose action(s) or the results can be reviewed internally. The value of this approach is speed (a few days) and reliability of a "robot" doing the evaluation against the latest known threats.

# IT Services

Generally the current menu of services has evolved and been proven historically through The Weston Group's work with private physician groups.

Services are available on a time and materials basis. One or more services might be bundled and consolidated under a Performance Agreement to share risk and fix costs or they can be provided on an ad-hoc basis. Projects might be implemented in a fixed price or Time and Materials manner. The choice is driven by client needs.

The Weston Group utilizes an advanced hiring approach to secure individuals who are functional to their roles and activities. This process includes IQ, skills and conceptual testing that produces improved results over subjective hiring approaches.

The Weston Group utilizes an industry leading ticketing and CRM system, Autotask, to manage all client issues. Solutions to service requests and incidents are governed by standards and measures and there is constant work to improve the results. The purpose is to ensure that required results are provided in a timely and reliable way.

The Weston Group also employs multiple systems for remote support, management and monitoring to ensure that the systems are up and functioning as desired.

## Engagement Process

Generally the process of engaging for specific services includes discussions of needs, an assessment and a proposed small pilot test of a project which might be the assessment itself. Specific solutions are designed and proposed based on these activities.

## Additional Information

<http://www.westonhit.org>  
<http://www.westontech.org>

# History

**The Weston Group** was founded by Wes Spears in late December 1992 with a strong and clear purpose of delivering results to clients.

One of the first efforts of the newly created Weston Group was assistance in the development of an EMR for an orthopedic physician. This effort grew into a full IT outsourcing relationship with a large healthcare organization. These outsourcing efforts continued and expanded to include development of applications and consulting to aid these organizations in achieving results.

The goal has always been to provide service to the healthcare market at a level that is meaningful and effective. In early 2015 The Weston Group began the final stage of the goal of widespread successful results to the healthcare market. Wes Spears was constantly seeking technology to expand the business and transform it into a nationwide organization while continuing to drive enhanced systems and reliability for delivery.

The Weston Group expects our current adaption integrating this advanced technology and our associated members to have two specific results. First our clients' organizations will far outperform competitors based on full reliability and advanced technology employed. Secondly, our clients' outcome will result in Weston's realization of significant growth in the US Healthcare Industry over the next 5 years.

Our historical clients were private physician groups. Over time this evolved to include hospital systems, Accountable Care Organizations (ACO's), Health Information Exchanges (HIE's) and vendors to the healthcare market such as Revenue Cycle Management and MSO companies.



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10101 Southwest Freeway  
Suite 500  
Houston, Texas 77074  
713 797 0068  
FAX: 800 878 1606  
Help Desk: 888 937 8660

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