The State of PDFs and Digital Documentation in Healthcare
Five Areas in Which Digital Makes a Difference

The healthcare industry has seen remarkable advances in digital technology over the last decade. But, despite efforts to fully digitize the healthcare landscape, paper and other means of legacy documentation persist in many organizations.

New survey results from HIMSS suggest that while the opportunity to better leverage digital documentation is great, adoption lags in the age of digital healthcare. While most respondents said they incorporate some PDFs and digital documents in their workflow, only 8% reported being entirely digital in 2020.

"We wanted to have a better understanding of the healthcare end-users of PDF solutions, and we wanted to understand the factors that drive adoption," said Stephen Wellman, Vice President of Content Strategy at HIMSS, about the survey. Wellman, a 20-year veteran in the digital marketplace, reported that while respondents agreed that PDF editors were essential and beneficial to their organizations, issues such as ease of use and cost were key barriers to adoption. "There is an opportunity for PDF editors to be easier to use across the organization," he said.

Key takeaways from HIMSS survey

The main takeaway from the survey* was that while two in three organizations reported using digital documentation, the overwhelming majority (92%) still relied on paper in their day-to-day. Wellman pointed out from the findings that there is a clear opportunity to access PDF documents across more situations. The survey found that only patient education materials and patient information documents were generated, reviewed or edited digitally by one in two organizations. Notes from rounds (23%) and immunizations (21%) were the least used situations for PDF adoption.

According to respondents, two big challenges to implementing PDF editors were the necessity of printing multiple forms, followed by patient access. However, Wellman noted that neither challenge affected most organizations: Only one in four respondents cited the necessity of printing many documents as the top challenge they faced. One in three reported patients not having access as their primary barrier.

The survey also suggested a disconnect between what healthcare organizations want from a PDF editor and what end-users experience. Fewer than 50% of respondents reported that their PDF was extremely successful in any one area: Providing seamless integration and cost-effective solutions appeared to be the most significant gaps. Although one in three respondents agreed that their PDF solutions were efficient, only 14% reported it made documentation easier for all users.

Fortunately, there are opportunities to explore new solutions on the market: Wellman found most respondents used or were familiar with Adobe Acrobat, a "top-of-mind" but costly solution in the field. "But that's changing," Wellman said, as more healthcare organizations are discovering new solutions entering the healthcare arena.

Five areas in which digital makes a difference

In light of these findings, Deboshree Sarkar, Product Marketing Manager at Foxit, highlights five areas where using digital documentation can make a difference to healthcare workflows. Sarkar speaks from experience. Foxit, a leading global provider of PDF solutions, has more than 560 million users worldwide and partnerships with Google, Amazon and Microsoft. "We've found that when healthcare organizations go fully paperless in each of these areas, they can significantly reduce the operational costs associated with paper and the manual processes," remarked Sarkar.

In no particular order:

1. **Forms processing**. Healthcare organizations process countless forms daily, which not only amasses a considerable amount of data, but also often involves accumulating sensitive patient information. Whether it's a patient onboarding form, insurance verification, release of information document, patient health history or patient referral form, Sarkar reported that her clients have described a more effective and patient-friendly experience after switching to a PDF solution. She said it's because they've removed multiple opportunities for user-error. By creating custom form fields within the documents, organizations can assign restrictions to each area (for example, only allowing numbers in the field for insurance ID), thereby making the form more straightforward and accessible across multiple platforms like a patient's mobile device. Furthermore, using 2D technology, an editable PDF solution can digitally stamp a barcode on the form containing the variable data entered by the end-user. This allows it to be easily transferable and accurately captured into the healthcare organization's databases or applications.

2. **Security and compliance**. To be HIPAA-compliant, all medical record information shared with third parties must have the ability for users to search and redact any information that could identify people individually. PDFs can also be password-protected and sanitized. "By sanitize,

we mean strip out the hidden information, such as comments, file attachments and other metadata," said Sarkar. Using redaction, password protection and sanitizing document features, medical providers can securely share valuable information in real-time with different institutions without putting any patient's privacy at risk. HIPAA also requires healthcare organizations to retain their records for a minimum of six years from the date of creation. By using a PDF format called PDF/A, where A stands for archiving, organizations can compress mass quantities of documents for long-term preservation.

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3. **Approvals and signatures.** Signing documents by hand can be error-prone and time-consuming. Digital documentation can also help eliminate the paper-based signature process and all the bottlenecks created by it. Sarkar recommended working with a PDF vendor that offers multiple signing capabilities, whether it's e-signing, a simple stamping with signature images, or full digital signatures that go through third-party certificate authorities like Verisign or Entrust. Foxit's PhantomPDF also offers trusted e-signature through its built-in integration with DocuSign, a leading digital signature provider. "This has really helped our clients reduce their turnaround time but also very importantly improve the employee and patient experience," said Sarkar.

4. **Systems integration.** As the survey results show, healthcare organizations want a PDF editor to integrate with their other systems and applications. "Many of our healthcare customers use various document management systems, so the ability to open, edit, save directly to and from these systems is crucial," Sarkar noted. Foxit's PhantomPDF integrates with other content management systems and cloud storage services like SharePoint and Microsoft Azure. In products such as Microsoft Outlook and Word, PDF editing capabilities are available right in the application.

5. **Review and collaboration.** Whether it's checking patient cards or working with medical research teams, knowledge workers will often need to provide feedback within a document. "Sharing information via annotation or comments are commonly observed as a way to reinforce collaboration within a healthcare team," Sarkar acknowledged. But, paper is cumbersome and printed annotations only slow down the process. Sarkar recommended using a PDF editor that offers shared review features for team members.

Doing more with documents

Documentation using paper is costly, wasteful and time-consuming. To support organizations as they transition to digital documents, PDF vendors must address all three of these problems. For Cura Day Hospitals Group, Australia's leading provider of private hospital facilities, their main concern was finding a cost-effective solution that their employees wouldn't have to spend time figuring out how to use. They could no longer sustain Adobe Acrobat, but they needed a PDF software that was intuitive and straightforward. After a brief trial, the group implemented Foxit's PhantomPDF editor across the entire organization, reporting that the solution assisted "in following the standards of clinical documentation not only to protect hospitals, but also ultimately to provide better treatment for patients."[1] There are many ways to reduce the amount of paper and manual entry still involved in healthcare today. As the HIMSS survey suggests, transitioning to a dynamic PDF solution can support organizations on the path toward digital transformation.

To learn more about the advantage of implementing digital documentation solutions in your organization, please visit foxitsoftware.com.

*The HIMSS survey, *PDF solutions in healthcare: Understanding the market landscape*, sponsored by Foxit and published in August 2020, was completed by over 100 hospital and healthcare professionals across IT/technology, business and clinical.

Reference

1. Foxit. Software company Foxit shares how well-maintained health records can accelerate digital transformation [sponsored content]. *HealthcareIT News*. https://www.healthcareitnews.com/news/emea/software-company-foxit-shares-how-well-maintained-health-records-can-accelerate-digital.

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Foxit is a leading provider of innovative PDF products and services, helping knowledge workers to increase their productivity and do more with documents. Foxit addresses the needs of three distinct market segments. For End-User Productivity, Foxit delivers easy to use desktop software, mobile apps, and cloud services to make knowledge workers more productive. ConnectedPDF delivers leading edge technology that powers document management, security, and collaboration services for PDF files. Foxit's Developer Solutions enable developers to incorporate powerful PDF technology into their applications. For Enterprise Automation, Foxit provides server software for large-scale PDF document management and data capture.

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