PRACTICE MANAGEMENT SOFTWARE AND OTHER OFFICE AUTOMATION TOOLS

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Disclosures

- Stocks:
  - Merck, Pfizer, Google, Intel, Apple, IBM
- Hardware Used in My Practice:
  - Various PC / Mac desktop and notebook computers, iPad, iPhone, various laser printers and multi-function machine, Comcast Business Class (phone, Internet, TV)
- Software Used in My Practice:
  - Medisoft (practice management), Capario (clearinghouse), Navinet (insurance verification/eligibility), Care360 (Quest labs), Quickbooks (accounting, payroll, taxes), Allscripts ePrescribe

Objectives

- Describe practice management systems and office automation technologies appropriate for the clinical practice
Revenue Cycle Management

- Managed Care Contracting
- Scheduling & Registration
- Charge Capture & Coding
- AR Follow Up and Collections
- Claims Processing & Payment Posting
- Denial Management / Appeals
- Reporting & Benchmarking

Practice Management Systems

- Out-Sourced Billing
  - Billing Service
  - In-House Billing
  - Client-server systems
  - Office-based hardware and software
  - Software as a Service (SaaS)
  - Web-based or "in the cloud"

Billing Services

- Cost usually a percentage of collections (5-10%)
- Standard services
  - Submission of claims, claims tracking, posting payments, reporting
- Additional services
  - Patient statements, collections, appointment reminders, computerized scheduling and EHR hosted by billing service
  - May lower payroll costs... or not
- Qualifications, expertise and resources of staff
  - Certified professional coders
  - Claims scrubbing & rules engines to detect errors
  - "Devil is in the details"
  - HIPAA
  - Off-shore claims processing
- May lower payroll costs... or not
- Access AR reports
- Check references & review contracts
In-House Billing

- Higher payroll costs for experienced billing staff
- In-House billing gives practice more control
- Client-Server Systems
  - Higher upfront costs for hardware, software, installation.
  - Ongoing costs of upgrades and maintenance
  - Practice responsible for security of patient data
- Software as a Service (SaaS)
  - “in the cloud”
  - Hosted by vendor, reseller, or health system
  - Monthly subscription, hence lower upfront costs
  - Usually requires minimum term of 3 to 5 years
  - Need reliable high-speed Internet access with back-up
  - Data security issues
  - Ownership of patient data

To Interface or Not To Interface

- If adding an EHR from a different vendor to existing PM and/or scheduling software, an interface is usually necessary
- Separate IT modules, labs and spirometry will also require interfaces
- Interfaces cost money ($-$-$) and require regular upgrades and maintenance (”pointing fingers”)
- Integrated systems will minimize interfaces and may even be less expensive than separate modules plus interfaces

Other Components of Practice Management Systems

- Computerized scheduling
  - Need backup plan for computer failures
- Clearinghouse Services
  - Processing Claims
  - Claims scrubbing
  - Insurance Verification & Eligibility
  - Electronic Remittance Advice (ERA) & Automated Posting
  - Electronic Funds Transfer (EFT)
  - ICD-10
Document Management and Faxing

- Standalone Fax
  - Wastes time, paper, toner/ink, steps
- eFax
  - More efficient but everyone needs computer access
  - Allows routing to appropriate staff and selective printing
- Document Management
  - Standalone product or integrated with EHR
  - Maybe part of some PM/EHR applications
  - Can help streamline workflow and get practices ready for EHR
  - Reduce paper and associated expenses
  - HIPAA compliance

Patient Portal

- Online appointment requests
- Secure messaging
- Refill requests
- Patients can access and fill out forms
  - Registration, medical/allergy histories, record requests, etc.
- Patient payment
- Part of EHR or separate module
- May be part of Document Management System
- Will need this for Meaningful Use
- Develop office policies regarding use of patient portals
  - Deal with patient expectations

Important Office Hardware

- Telephone systems
  - Automated attendant
  - Staff voicemail
  - Staff headphones
  - Remote call forward
  - Message on Hold
  - Practice information
  - Patient education
  - Legal music
- All-in-One Machines
  - Copier/fax/scanner/printer
  - High end models can be networked and shared by staff
  - Smaller models good at nurse’s station/shot room to cut down steps
  - Color laser models more expensive but good for printing handouts, flyers, asthma action plans on demand
**Other Office Automation Tools**

- Insurance Card Scanners
  - Scan insurance and ID cards into PM system or separate database
  - Saves time and steps
  - Small footprint

- UPS
  - Saves electronic equipment from damage and allows time for orderly shutdown
  - Check on regular basis

- Disaster Planning
  - Backup equipment
  - Policies and procedures in place

- Appointment Reminder Systems
  - Free-standing or part of EHR
  - Purchase or monthly fee
  - Integrates with scheduler
  - Useful for patient recalls and emergency notifications
  - Helps reduce "no shows"

- Remote Access
  - Technical support troubleshooting
  - Training
  - Connecting offices
  - Access systems from home or hospital

**More Office Automation Tools**

- Payment Technologies
  - Credit Card Processing
  - Payroll Direct Deposit
  - Online Banking and Bill Pay
  - Remote Check Deposit
  - Healthcare Financing
  - Real-time patient responsibility calculators
    - May include CC processing with card on file options

- Speech Recognition Software
  - Kiosks and Tablets
    - Patient registration and health questionnaires
    - Patient self-pay
    - Patient education

- Cyber-Security
  - Policies and Procedures
  - Hardware and Software

**For Practices without an EHR, Don’t Leave Money on the Table!**

- ePrescribing
  - National ePrescribing Patient Safety Initiative (NEPSI)
    - To register, go to [http://www.nationalrx.com](http://www.nationalrx.com)
  - Report G code (G8553) on claim forms when prescriptions sent electronically at time of office visit for Medicare patients

- PQRS (Physician Quality Reporting System)
  - Preventive health, medication list, asthma, COPD measures applicable to allergy practice
  - AIA web site has resources for PQRS
  - Report on claim forms or via registry
    - PQRIwizard available at discount through AAAAI
  - Create a PQRS “superbill” or “flowsheet” for Medicare visits
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