PRACTICE MANAGEMENT SOFTWARE AND OTHER OFFICE AUTOMATION TOOLS

Linda D Green, MD, FAAAAI

Disclosures

• Stocks:
  • Merck, Pfizer, Google, Intel, Apple, IBM

• Hardware Used in My Practice:
  • Various PC / Mac computers, iPad, iPhone, laser printers and multi-function machines, 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
Top Challenges Facing Physicians in 2014
(Medical Economics, December, 2013; Physicians Practice, January, 2014)

- ACA and changing payment trends
  - Soaring deductibles and coinsurance in addition to copays
  - Payers consolidating networks; tiering of hospitals and providers
  - Declining reimbursements
- Government mandates
  - ICD-10: Convert or don’t get paid
  - Meaningful Use: Attest or face penalties
  - HIPAA: Risk analysis plus more stringent penalties
- Technology costs
- Staffing and training
- Changing patient populations
  - “The year of the new patient”
  - “The year of the high-deductible health plan patient”

8 Technology Predictions for Medical Practices in 2014 (Physicians Practice, Jan, 2014)

- Bigger shift to the cloud
- Patient portal use will grow
- Windows XP will be done
- Doctors will push for BYOD (Bring Your Own Device)
- Regulations will drive IT decisions
- “Big data” technology will grow
- Mobile health will thrive
- Patients will become more engaged

Understanding the Revenue Cycle
RCM Systems (aka Practice Management Systems)

- Out-Sourced Billing
  - Billing Service
- In-House Billing
  - Client-server systems
  - Office-based hardware and software
  - Cloud-based systems
  - Web-based subscription services

Billing Services

- Cost usually a percentage of collections which varies according to services provided
  - Standard services: submission of claims, claims tracking, posting payments, reporting
  - Additional services: patient statements, appointment reminders, scheduling, 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
  - Still need to have staff to oversee the work
  - Access & review 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
- Cloud-based Service
  - “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 necessary interfaces

Payment Technologies
- Credit Card Processing with Card on File
- Electronic Remittance Advice (ERA)
- Electronic Funds Transfer (EFT)
- Remote Check Deposit
- Healthcare Financing
- Real-time Patient Responsibility Calculator
  - Determine copay, deductible and coinsurance at point of service
  - May include CC processing with card on file options
- Batch Insurance Verification & Eligibility
- Payroll Direct Deposit
- Online Banking and Bill Pay

Other Components of Practice Management Systems
- Computerized scheduling
  - Usually part of practice management system or EHR
  - 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
  - Patient Financial Responsibility Calculators may be included
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
- Patients can access and fill out forms
  - Registration, medical/allergy histories, record requests, etc.
- Refill requests
- Secure messaging
- Patient payments
- Part of EHR or separate module
- May be part of Document Management System
- Need this for Meaningful Use
- Develop office policies regarding use of patient portals

Important Office Hardware
- Telephone systems
  - Automated attendant
  - Staff voicemail
  - Staff headphones
  - Remote call forward
  - Message on Hold
  - Practice information
  - Patient education
  - Legal music
- Scanners
  - Many EHR’s require standalone scanner
- 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

- Speech Recognition Software
- Kiosks and Tablets
  - Patient registration and health questionnaires
  - Patient self-pay
  - Patient education
- Cyber-Security
  - Policies and Procedures
  - Hardware and Software
  - HIPAA Compliance

Helpful Resources

- Vendor or Reseller of EHR/PM systems and ancillary technologies
- Local and National Consultants
- AAAAI (www.aaaai.org), ACAAI (www.acaai.org)
- AMA (www.ama-assn.org)
- State and County Medical Societies
- PAHCOM (www.pahcom.com), MGMA (www.mgma.com)
- HIT Regional Extension Centers
- Hospitals and Health Systems
- Google