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Management systems can always be more efficient

Curbside Consult

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Q: *I am always hearing from colleagues who use the same practice management system as me that they have all these automation and efficiency benefits I am not getting. What steps should my office manager take to ensure maximum use of our system?*

A: Unfortunately, the belief that a practice uses only a portion of its system's capabilities is more often true than not. Best practices seem to gain the most when staff no longer perform transaction or quantity-based tasks, and instead focus on qualitative and reasoning functions.

To maintain the highest levels of automation, require a periodic assessment of your use of the system's capabilities and implement unused or underutilized technologies currently available from the vendor, which can provide value to your practice's operations. First, verify your version is current and ensure use of all applicable modules; and second, navigate all screens and menu options to search for capabilities.

- Look at each data input area for maximum efficiency:
- demographics/insurance entry and verification
- dictation/transcription
- data tables, procedure and diagnosis, fee schedules, contracted reimbursements, providers and locations
- coding and charge entry
- pre-billing, claims scrubbing, electronic and paper insurance billing and rebilling
- patient statement billing
- payment, denial, and contractual adjustments entry and analysis
- payment variance to contracted amount analysis
- inhouse collection follow-up process including notes
- small balance and bad debt adjustments and analysis
- collection agency placement process.

Implement reporting and analysis for each area above and overall staff performance auditing by staff member, for each of the above areas. Then, seek staff and vendor input;

- revisit initial implementation notes and process; and speak with other practices using the same system for their insights. In addition, look at outside vendor solutions as well.

Once improvement areas have been noted:

- Rank in order of efficiency gains
- Note any benefits expected through reduced costs or collections increase
- Note any costs for either obtaining or implementing
- Select implementation order — start with those requiring no or minimal expense outlay and/or maximum gain
- Prepare and plan for implementation including testing
- Prepare and plan for staff training/downtime/use of dual systems, if applicable
- Avoid unrealistic staff/management expectations of the expected benefits
- Assign the implementation team or lead staff for each improvement
- Set deadlines and start the implementation
- Follow-up on progress through weekly meetings and reassess all aspects of the order, timeframes, deadlines, team members/leads throughout the process.

As with all aspects of technology, change is inevitable. The process of review and assessment, implementation planning, testing, training, use, and results analysis is a revolving cycle. The key is to stay current with available technology so you can more readily adapt to improvements in system capabilities as they are released.

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