Dr. John Brimhall's
Puzzle Piece
newsletter
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Where to Start When You're Looking for Software for Your Practice

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If you're unsure where to start, uncertain which decision is the right one and even unsure what questions to even ask, YOU better read on...

Doctors and CA's alike. I have asked Brandy to cover this very important SOFTWARE QUESTION. She is consulting many offices that are having nightmares instead of dreams in this very important area. This will be one of several articles I will have her write. This is a little lengthy but will likely save you thousands of dollars and hundreds of person hours. Only her mind and understanding can come up with the lists of problems and solutions outlined below.

Dr. John

You may have already found that there's not a simple solution to finding the perfect software for your practice. If you're brand new to practice, you may find that you aren't certain what you even need in a software program. The software research is overwhelming among everything else you are working to prepare or implement into your practice. If you're already in practice, you already have so many systems/office procedures in place (or should be in place), you must choose software that flows with your present systems to create the most efficiency and ease in transition.

That being said, it is important that you recognize the following: CHANGING SOFTWARE WILL REQUIRE SOME SPECIFIC STEPS OR SYSTEMS IN YOUR PRACTICE TO BE ALTERED IN ORDER TO BEST ACCOMMODATE THE SOFTWARE PROGRAM. Understanding this and being prepared for these changes is guaranteed to save you hours of frustration and enable you to properly and effectively make the proper alterations before you begin to recognize holes in systems that weren't there before.

Investing in software is a big decision and a big commitment. Not only are you taking on expense, there is also a transition that your staff and practice will go through while implementing this software and implementing it properly. As with any other implementation to your office, there is a process TO do this efficiently and effectively.

As you have probably noticed, there are lots of software companies and sales people claiming to be exactly what you need. What you must realize is that the needs of every office are not the same. So, before you make an investment like this, you must first determine what will work best for YOU.

Part I:

1. Why are you looking to change or add software?
2. What features do you want or need in new software? (For examples of features, see the end of this newsletter.)
    a. Discuss this as a team in your office so everyone can offer insight as to what would be helpful in each individual department.
3. What features do you have in your current software or systems that are important to have in any new software program when you make a change?
    a. Discuss this as a team and be as detailed as possible to specific features that are used to aid with thoroughness & efficiency (examples: inventory stats, reactivation/ missed
    appointment reports, etc)
4. What is your software spending budget (consider software cost, tech support & upgrades)?

5. How soon would you like to upgrade or change your software?
    a. What is your goal date for final decision on which software program is best for you, as well as, when is your goal date for implementation of the new program?
6. What software companies are candidates for your practice?
7. List their names, phone numbers, websites, etc.

Part II.

1. Contact each of the software companies you have listed, ask specific questions regarding featureS you need and features you want, as you have listed above.
    a. Consider asking for references to check
2. Schedule and participate in a demo of the software to specifically see these features as well as the features of the general program.
    a. Make specific notes as to what the software can and cannot do as well as the general ease of learning and use of the software.
3. Determine Pros and Cons
    a. List the pros and cons of each software.
    b. Look for features you want that may not be available in different software systems....
        i. Discuss and make notes of if/how these features can be handled manually or in another manner so as to not be skipped, or skip this software program if it does not meet your needs.
        ii. Discuss with software companies to see if said system(s) may be added to an update at some point.
    c. Discuss as a team your findings, ideas, concerns, etc as you have gone through this process. Decide as a team which software is best for you.

Additional tips:

- Plan Ahead once you have decided on a software program. Here are steps to follow to efficiently implement this software and to do it as smoothly as possible.
- Remember that the people you speak to at software companies are sales representatives. Their job is to convince you that their program is the best for you. Be sure to get the necessary information so YOU can make this educated decision.
- Be sure to ask about specific fees such as tech support, updates, upgrades, etc.
- Be as detailed as possible as you list features you want and need in a software program. This will be a huge time saver as you train and transition to your new software.
- Set a goal date for complete implementation of your new software.

Examples of features you may find necessary (this is not a complete list of necessities but rather a list of features that are often overlooked when researching software):

- Scheduling; ability to schedule multiple types of procedures
- Missed appointment and reactivation reporting methods for ease of follow up
- Documentation meeting current requirements and ease of documentation completion and future interpretation

- Ability to document additional services/items (ex. Nutrition) for record keeping and future tracking
- Set up of patient accounts, personal and primary and secondary insurance information (if applicable)
- Diagnosing and ability to update diagnosis
- 1500 Claim Form Boxes: ability to fill or update important boxes such as Date of Current (Box 14), Additional Diagnosis: Don't use this box for Medicare (Box 19), diagnosis pointing (Box 24E), Rendering Provider ID (Box 24J), Accepting or Not Accepting Assignment (Box 27)....just to list a few of the important ones that ted to be difficult to find or edit.
- Ability to access or add specific codes such as diagnosis codes, service codes & modifiers
- Insurance billing systems: claims submission log (showing proof of timely filing), ability to prepare, view and/or print claims for review or submission. Ability to print Tracers (resubmissions)
- Insurance Posting Systems ease of ability to make correct payment postings and write-off's, ability to post partial payments, ability to note take on specific dates of service for follow up record keeping purposes, ability to submit and track supplement/secondary insurance claims, separation of insurance balances an patient balances, ability to easily determine outstanding/open claims and their originally submission dates
- Ability to easily interpret patient accounts and ledgers as well as ability to make and note necessary edit
- Ability to post and monitor special types of payments such as prepays
- Statistics and reporting: weekly and/or monthly itemized statistics, ability to track specifics such as nutrition, comparison reporting month to month, quarter to quarter) to track growth, stability or decline, Accounts Receivable and aging reports, patient case types (cash, insurance(specific types of insurance), Medicare, Personal Injury, Work Comp), day sheets, month end reports
- Special reports or records: e-mail addresses, birthday reports, last visit reports (for reactivations), referral sources, inventory tracking
- Ability to attach or separate patient accounts (sometimes helpful when treating families)
- Patient billing: ease of ability to prepare patient statements, ease of ability for patient to interpret, tracking for aged or delinquent accounts

If you would like additional assistance with this or for specific software recommendations, please contact Total Practice Resources and ask to speak with one of our consultants. Please remember also that helpful information such as this and much more is offered free through the Total Practice Resources Spotlight (our newsletter). Webinars are also available and are full of invaluable information and training systems and would be a great instrument in your practice building, development and team organization. For all of this and more, visit us online atwww.totalpracticeresources.com or call (303) 242-8901.

I warned you there was much information to be gleaned in this area. Brandy attends and teaches at almost all three day Nutri-West/Brimhall Seminars. We all look forward to seeing you there real soon.

John W. Brimhall, DC and the Wellness Team

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