

Medical Practice Assessment Northland Medical Managers

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Holt Medical Practice Solutions

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Practice Assessment Elements

- Organizational Structure
- People
- Process
- Technology



Practice Assessment: Organizational Structure

- Governance Accountability
 - Formalized governance
 - Systematic governance
 - Governance understood
 - Stakeholders defined
 - Authority, responsibility, and accountability



Practice Assessment: Organizational Structure

- Organizational Dynamics
 - Group culture
 - Group expectations
 - Professionalism—encouraged or discouraged
 - Leadership qualities
 - Roles
 - Respect for all roles



Practice Assessment: Organizational Structure

- Human Resources Philosophy
 - Policies and practices
 - Communication of policies and practices
 - Adhere to federal, state, local regulations
 - Training
 - Accountability
 - Employee rights & responsibilities
 - Grievance procedure



Practice Assessment: Organizational Structure

- Problem Solving Responsibility
 - Empowerment to solve problems
 - Knowledge of situation
 - Critical Thinking
 - Educational requirements
 - Experience
 - Skill
 - Ability



Practice Assessment: Organizational Structure

- Communication Style
 - Open
 - Reporting relationships defined & utilized
 - Reporting changes
 - Reporting expectations
 - Feedback



Practice Assessment: Organizational Structure

- Planning & Marketing Performance
 - Strategic planning
 - Implementation of processes
 - Meetings
 - Target marketing
 - Industry standards
 - Trend analysis
 - Environmental analysis



Practice Assessment: Organizational Structure

- Risk Management Strategies
 - Effective communication with patients
 - Documentation
 - Informed consent
 - Confidentiality
 - Carrier



Practice Assessment: Organizational Structure

- Decision-making Approaches
 - Information shared
 - Boundaries
 - Collective vs. unilateral
 - First concerns addressed
 - Decisions applied fairly
 - Role of staff
 - Workforce
 - Major changes
 - Conflict resolution



Practice Assessment: People

- Shared vision: unified philosophy
 - Who are we?
 - What do we offer?
 - Who do we wish to purchase our services?
 - What differentiates us from others delivering the same services?
 - Living a unified patient-centered mission.



Practice Assessment: People

- Participative Leadership
 - Sets example
 - Develops those around them
 - Feels sense of responsibility for employees
 - Empowers employees
 - Practices good communication
 - Coordinates processes and follows-up
 - Admits mistakes without blaming others
 - Thinks and speaks in terms of “we” not “I”



Practice Assessment: People

- Develop team ethic
 - Participate in goal setting & outcomes review
 - Right mix
 - Self-regulate
 - Open discussion
 - Shared work assignments
 - Satisfaction with effort
 - Win collectively



Practice Assessment: People

- Cultivate long-term employees
 - Hiring
 - Training & cross training
 - Fair flexibility
 - Laugh
 - Celebrate small successes
 - Demonstrate caring
 - Peer expectations



Practice Assessment: People

- Demonstrate customer service excellence
 - Internal & external customers
 - Golden rule
 - Personal baggage
 - Setting expectations
 - More than is expected
 - Responsibility for excellence



Practice Assessment: Processes

- Patient registration & intake
 - Patient education
 - Obtain & verify information
 - Categorizing patients
 - Signing documentation
 - Instill confidence



Practice Assessment: Processes

- Charge Capture
 - Deductibles, co-pays, & co-insurance
 - Timely charging
 - In-house seminars
 - Physician compensation
 - Pre-certification



Practice Assessment: Processes

- Insurance filing & tracking
 - File claims electronically everyday
 - Ensure that clean claims are sent
 - Track insurance daily
 - Track claims paid incorrectly by carrier
 - Appeal all claims paid incorrectly
 - Bring patients into the process early
 - Keep time frames short



Practice Assessment: Processes

- Collections
 - Don't be shy about expecting to be paid
 - Accounts manager speaks to every patient who owes the practice money when the patient is in the office—face-to-face contact is most effective
 - Flag accounts that are bad-debt write-offs for future information



Practice Assessment: Processes

- Collections
 - Create appropriate statement messages that reflect the seriousness of delinquency
 - Make every attempt to collect personal balances immediately after insurance pays
 - Turn personal balances over to reportable collection agencies
 - Work accounts in queues by aging & \$\$\$\$\$



Practice Assessment: Technology

- Assessment
 - Know what you need to know
 - Plan & take planning seriously
 - All staff maximize use of technology
 - Know what problems technology can solve
 - Provide the level of technology to track all elements of your business
 - Technology dictates ability to be effective & efficient



Practice Assessment: Technology

- **Functionality**
 - Functionality is more important than the technology itself
 - Technology is used to manage sound processes
 - Technology is a tool to get the job done
 - Use technology to determine the way you work, track work, and report what you have done
 - Automate every task that can be automated



Practice Assessment: Technology

- Integration of Clinical & Business Operations
 - Effectively manage clinical information—tests, reports, & pre-authorizations—that support the business side
 - Harmonious coordination between both functions
 - Financially support integrated systems, installation, training, & support
 - Up-to-date patient applications



Practice Assessment: Technology

- Maximize Current System
 - Oversight of system management & maintenance of system
 - Evaluate current use
 - Capability of new functions
 - Trusted data
 - Tracking & reporting ability



Practice Assessment: Technology

- Information Management
 - Reporting capability
 - People receiving reports
 - Action based on reports
 - Charting the flow of clinical information
 - Charting the flow of business information
 - Compile data in meaningful format



Practice Assessment: Technology

- Security
 - Confidence in information security
 - Maintain proper release & disclosure of information policies
 - Consider security in all business & management decisions
 - Write & maintain a disaster management plan
 - Take security policies & procedures seriously



Medical Practice Assessment

■ Questions?

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