Today's Webinar will Cover

- Best practices in billing efficiencies

- Addressing operational procedures

- Implementing SMART goals to improve practice performance

- Improving online reputation

- Improving professionalism among your staff

- Optimizing communication and information exchange procedures

- Coordinating transitions of care

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Objective

Build a successful practice when time is limited and patient satisfaction critical

Strategy: Improving Billing Efficiencies

Tactics:

- Communicate any services to patients that may not be covered by insurance.

- Check patient eligibility at least two days in advance to assure coverage.

- Assure prior authorization/referral is obtained for any visits/procedures if needed.

- Perform quarterly audits on coding for compliance.

- Complete thorough charting with correct CPT codes and modifiers.

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Strategy: Improving Billing Efficiencies

Coding Resources:

Coding updates can be obtained through your specialty society, medical association or directly on the Medicare website.

- **Local Medical Association**
  - **https://www.cmadocs.org/**

- **National Medical Association**
  - https://www.ama-assn.org/practice-management/cpt

- **Specialty association**
  - **Orthopedics- https://www.aaos.org/**
  - **Family Practice- https://www.aafp.org/home.html**
  - **Psychiatry- https://www.psychiatry.org/**
  - **Plastic Surgery- https://www.plasticsurgery.org/**

Strategy: Addressing Operational Procedures

Human Resources

Tactics:

- Distribute an HR Manual with written policies and procedures so all staff understand expectations and know what is expected of them.

- HR Manuals should be updated annually to any reflect changes in employment laws.

- Evaluate team responsibilities to assure cross training and create job descriptions.

- Provide employee handbooks and review policies and procedures with all employees as part of employee orientation and training.

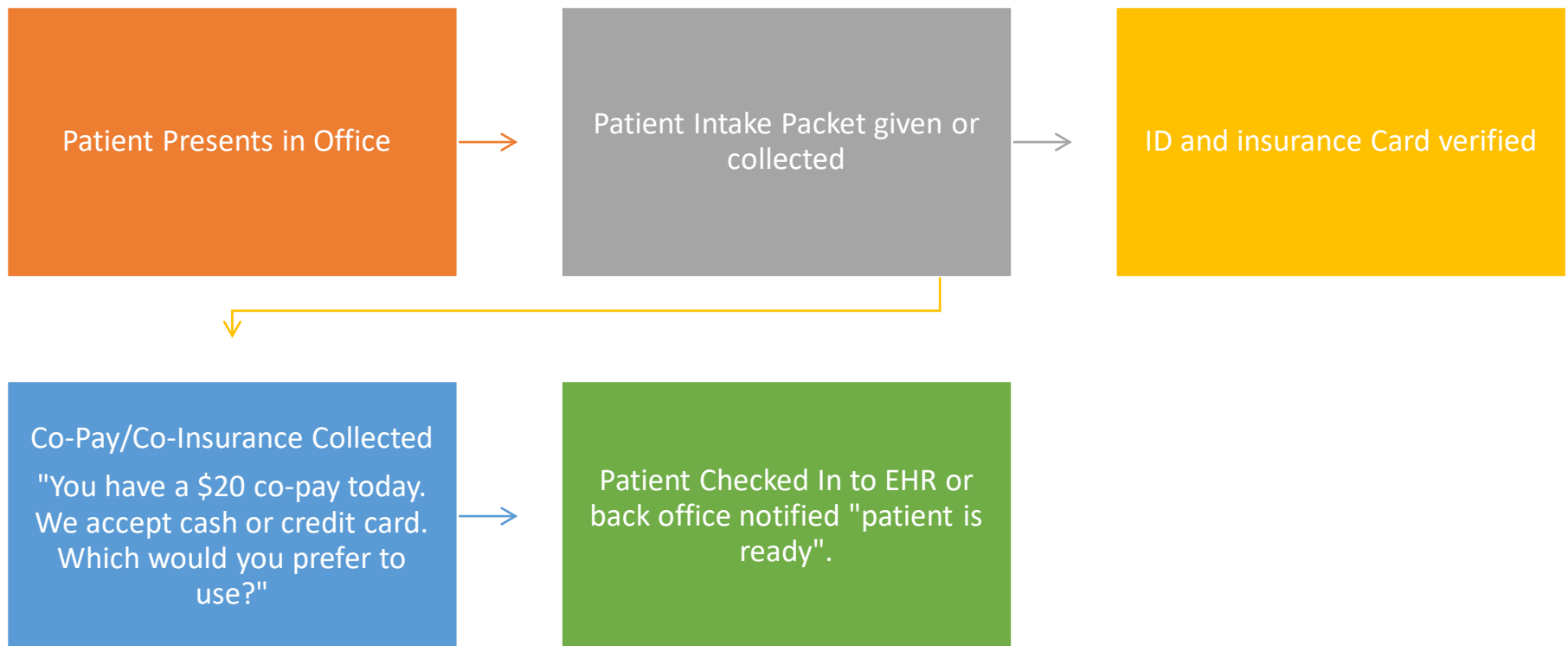## Strategy: Addressing Operational Procedures

Practice Workflow

Tactics:

- Evaluate patient protocols so that there are detailed guidelines for the team around basics like patient intake, referrals, and telephone calls.

- Create workflows for patient check-in, telephone messages, authorizations/referrals, and lab and imaging results.

- Workflows can be written or put in a flow chart, but a policy helps everyone know the process, and ensures nothing falls through the cracks.

- Implement communication protocols between front and back office for a seamless patient experience.

- Complete all intake paperwork prior to patient being brought to the back office.

Strategy: Addressing Operational Procedures

Sample Check In Process:

Patient Presents in Office	→	Patient Intake Packet given or collected	→	ID and insurance Card verified

Co-Pay/Co-Insurance Collected "You have a $20 co-pay today. We accept cash or credit card. Which would you prefer to use?"	→	Patient Checked In to EHR or back office notified "patient is ready".

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Strategy: Implementing SMART Goals to Improve Practice Performance

Tactics:

- Identify goals for your practice

- Involve your staff

- Make sure goals are:

Specific (simple, sensible, significant)

Measurable (meaningful, motivating)

Achievable (agreed, attainable)

Relevant (reasonable, realistic and resourced, results-based)

Time bound (time-based, time limited, time/cost limited, timely, time-sensitive)

Strategy: Improving Your Online Reputation
SMART Goals in Action

Tactics:

S Increase online presence and assure practice is meeting patient's needs by asking patients for online reviews

M Reach online 5-star status online

A Solicit feedback from the team on implementation activities

R Print 1000 cards to hand out to patients after check out asking " Did we meet or exceed your expectations today"? If yes, request review

T Six-month goal to get 300 online reviews complete with a stretch goal of 500 reviews in 6 months

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Strategy: Improving Your Online Reputation

Tactics:

- Set up a Google Alert for your name and/or the name of your practice; you'll receive an email each time you are mentioned on the web.

- Assign a staff member to regularly monitor customer review sites.

- Update incorrect demographic information when applicable.

- Personalize your comments by adding a clear professional photo to your profile.

- Responses to reviews should be kept simple, polite, honest, professional, and compassionate.

- Address the changes that are being made to prevent the scenarios in the negative review.

- End replies by showing that you care by simply stating: "Thank you. We appreciate all feedback."

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Any goal can fit into a SMART goal template

Achieving focused goals will help our practice run better

Succeeding in Your Practice Requires a Collective Effort by All Members of the Practice
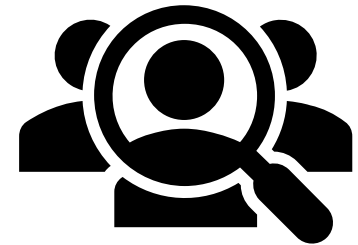
Strategy: Improving Professionalism Among Your Staff

Professionalism

… is a commitment to carrying out professional responsibilities, adherence to ethical principles, and sensitivity to a diverse patient population.

ACGME Competencies

….. is the conduct, behavior and attitude of someone in a work or business environment. … **Professionalism** leads to **workplace** success, a strong **professional** reputation and a high level of work ethic and excellence.

Virginia Tech Career & Professional Development

Strategy: Improving Professionalism Among Your Staff

Challenges:

- Irresponsibility
- Diminished capacity for self-improvement
- Poor initiative
- Ignorance

Hannah J. Zackson, MD: *Creating Professional Leaders*

Strategy: Improving Professionalism Among Your Staff

Tactics:

- Have respect for oneself, leadership, your colleagues and most of all patient's and their families.

- Keep the relationship between the patient and the staff purely professional.

- Protect the confidence of the patient at all costs. Be mindful electronic data and the use of social media.

- Be accountable – fulfilling the multiple levels of the patient-physician-staff relationship.

- Maintain medical knowledge, improve clinical and team skills, necessary for providing quality care.

- Always strive for quality of care and participate in mechanisms to reach and maintain those goals.

- Commit to excellence. Exceed ordinary expectations.

Strategy: Optimizing Communication and Information Exchange Procedures

Demonstrate interpersonal and communication skills that result in effective information exchange and teaming with patients, families, and professional associates.

Ian A. Cook, MD: *Teaching and Assessing Professionalism and Communications*

Strategy: Optimizing Communication and Information Exchange Procedures

Adverse outcomes from non-technical errors are most likely to have a root cause in poor communication.

Papadakis Acad Med 2004

Strategy: Optimizing Communication and Information Exchange Procedures

Tactics:

- Engage in active listening.
- Practice authority vs arrogance.
- Manifest confidence vs condescension.
- Teach, don't patronize.
- Model collegial behavior.
- Always keep the whole patient/picture in mind.
- Be in charge, like the captain of the ship.
- Create an environment where staff can feel free to raise questions without the fear of reprisal.
- Diffuse conflict amongst staff by encouraging discussion/w mediation.

Most Importantly—Exchange Information!

Give and receive information accurately and in a timely manner to support patient care.
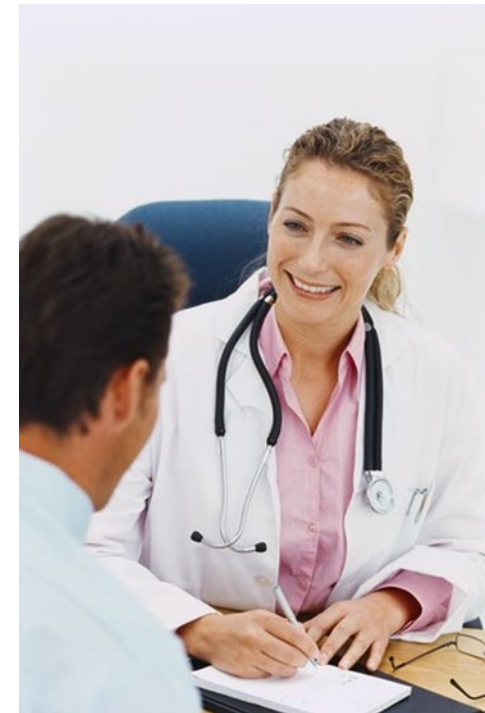
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Strategy: Coordinating Transitions of Care

Work together with others to carry out activities in an efficient, simultaneous, collaborative manner.

Strategy: Coordinating Transitions of Care

Tactics:

- Medication Management

- Transition Planning

- Patient & Family Engagement & Education

- Information Transfer

- Follow up Care

- Healthcare Provider Engagement

- Shared Accountability Across Providers and Organization

"Big Picture"

Establish a shared understanding – ensure that everyone has not only the relevant information for the situation at hand, but also can share in the "big picture."

Remember...patients have a choice. Let it be you!

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"We are what we repeatedly do.
Excellence, then, is not an act, but a habit."

Aristotle

Questions?