Protecting Your Computer Records

If you store patient files and financial data electronically, a computer problem could create a recordkeeping crisis. Protecting your data requires reliable storage, back-up, and recovery arrangements. Here's how to put them in place.

Make a Specific Plan

The danger of a computer crash is real. You have to assume you'll experience one eventually and plan to limit its effects.

Risking the loss of essential practice data is an unacceptable alternative for two reasons. You need to keep your practice operating without disruption. And federal regulations may require you to have a health information back-up and recovery plan.

Your ability to recover from a crash, fire, flood, tampering, or other computer problem depends on having a reliable back-up system in place. Its specific design should reflect the individual circumstances of your practice.

Generally, you need to copy each day's new data systematically from your PCs to a disk or magnetic data tape and store it away from your office. You also need to create a back-up copy of your entire system at least once a week and store it offsite.

The data backups can be automated so that input from your office staff is not required. Server-based systems usually include a redundant disk backup of multiple hard drives, but you still need to arrange offsite storage for protection against a general system failure.

Another possible back-up arrangement worth considering is use of the Internet. You can transmit your data daily to an application service provider (ASP) for storage. Just make sure that the ASP you contract with protects its own data well and that each of your Web-enabled PCs has an up-to-date antivirus program.

An uninterrupted power supply (UPS) offers inexpensive additional protection. This device will preserve your records during outages by maintaining power long enough for data to be saved and your system to be shut down without damage.

Choose Appropriate Storage

Hard disks or other magnetic media storage work well for protecting current data because they keep information ready for reference as needed and can be erased when the age of the data is beyond the required storage period. To permanently store your inactive patient data, use read-only, non-rewritable disks that will quickly provide access if it is ever needed.

Limit Access

To restrict access to your patients' electronic data, you can build controls into your system's file structure. For example, you might allow only physicians and nurses to view medical files and let only bookkeeping staff and administrators examine financial files.

Protecting your patient and financial data can prevent a sudden and serious disruption of your practice. It's not only important -- it's a necessity.
Simple Steps to a Smoother Running Office

Improving your practice's daily workflow needn't be a complicated time management or automation project. Instead, some simple changes can make a real difference in how well your office functions.

**Patient Flow:** Are your patients ready to be seen when you are free? Just making sure your staff moves patients to exam rooms without delay can be a time saver. Also review how the typical patient visit unfolds to find out whether physicians are repeating any steps that the nursing staff has already taken care of.

**Uniform Tools:** Your rooms may not be all the same size with identical furnishings and fixtures, but using a uniform setup for each exam room can prevent delays. Simply maintaining an identical stock of supplies and forms in each room will eliminate the occasional need to stop and search for these items while you are with a patient.

**Incoming Calls:** Your office phone traffic is another place to look for improvements. For example, it may not make sense to initially route incoming calls to a triage nurse if you find that most callers with immediate needs receive appointments. On the other hand, having patients speak with a nurse may be desirable if you find that most patients require a call back. Providing better guidelines for handling triage questions may greatly reduce the number of interruptions you experience while seeing patients.

Try tracking the questions your office receives from patients who were recently seen. You may find that many want information that easily could have been given to them during their visits.

Taking a little time to examine how your office is operating now can lead to simple and effective improvements.

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Countering the Risk of Staff Dishonesty

Drivers wear seat belts because an accident may happen, not because it necessarily will happen. Although dishonest employees in medical offices are rare, it's sensible to set up your financial procedures in ways that will help keep losses from occurring. Here are some simple suggestions.

**Control and Monitor**

Any medical practice needs a simple system of internal controls that prescribe how cash, co-pays, other receipts, disbursements, and bank statements are to be handled. For example, someone besides your bookkeeper should be looking at those statements. You or another physician should be signing all checks. And your employees should know you keep an eye on payments from the petty cash box.

**Check Card Use**

Misuse of a practice's credit cards can be easily concealed if bills are not carefully examined. At a minimum, make sure the bookkeeper who receives the bills does not write the payment checks. Even better, have all credit card bills sent directly to you or another physician in the practice.

**Require Vacations**

Sometimes, employees avoid taking time off because they fear a substitute may discover financial irregularities they've been concealing. Making all employees take an annual vacation can provide simple and effective protection against such irregularities.

**Reconcile**

Many practices use a general ledger accounting system and separate billing software. Having them periodically reconciled can reveal errors and improper entries.

**Call on Us**

As experienced accounting professionals, we can review your financial controls and help you strengthen them if needed. Please don't hesitate to call if we can be of assistance.
Avoid Electronic Billing Delays

If you bill electronically, managing the details of your practice’s workflow can help prevent delays in receiving payments. Consider the following suggestions.

**Keep Provider Records Current**

Correct IDs are essential for all of your e-billing, whether your practice submits claims directly to payers or to a clearinghouse.

Make sure that your system has current Medicare IDs for all of the facilities where you treat patients and that the IDs your payers have assigned to your practice's physicians and other providers are current. Have your staff keep them updated as changes occur in your practice and in your payer list. If you use a clearinghouse, also keep your list of its payer IDs current.

**Update Patient Data**

Working ahead on patients' data beats playing catch up because it saves time and prevents problems at the time of service.

Whenever possible, have your staff verify patients' insurance eligibility before each office visit and, if needed, obtain an authorization for submitting claims.

When a referral will be needed for a patient's visit, try to obtain it in advance by fax from the primary physician or the patient. Often, patients' insurance eligibility can be quickly confirmed online at the payers' websites.

**Check First**

Successful acceptance of claims depends on the quality of the data your practice submits. Before transmitting a claim, have your billing staff check it carefully for missing information.

Your software may have an editing function that can help to identify omissions and other problems. If such a function is available, make sure your staff consistently takes advantage of it.

**Track All Transmissions**

Was the claim file actually sent and was it the correct file? Your billing staff should confirm all transmissions by matching your claims list to the 277 reports provided by electronic carriers.

Once claims are successfully completed and transmitted, have systematic follow-up procedures in place to track the status of each claim until paid.

Your software should be helpful in identifying billed and unbilled charges, paid/unpaid status, and the receipt of payments. On a set schedule, have your staff contact payers to determine the status of all late payments, identify reasons for the delays, and resolve outstanding issues.

**We Can Help**

More efficient billing should not be difficult for your practice to achieve -- if you approach the process systematically. Let us review your entire billing operation and suggest more ways that you may be able to improve it.

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**Make Someone Responsible**

One individual should be in charge of data backup and recovery for your practice. Besides data protection, that person's responsibilities could include ensuring that your computers have enough data storage capacity for your growing needs.

Every computer system has a limited storage capacity. That makes maintaining an adequate margin between your usage and the system's capacity important if you are to avoid operating problems. When the margin narrows, your data manager can decide whether to move documents into read-only media or add more storage capacity.
Continuing Medical Education Online

Seventy-two percent of physicians surveyed by Manhattan Research LLC used the Internet in 2004 for continuing medical education. The physicians obtained 18% of their CME credits using the Internet.

PPOs Remain America's Dominant Payer

According to Kaiser Family Foundation research, preferred provider organizations were again the dominant type of health plan in the U.S. during 2004, with a 55% market share. PPOs have held more than half of the market since 2002. Health maintenance organizations were 25% of the market in 2004, down considerably from their peak share of 31% in 1996.

Cultivating Referrals

To help increase referrals, keep referring physicians informed with undelayed, complete feedback and always attach a note of thanks. Make yourself better known through lectures and by sending prospective referrers news about procedures and medications used in your specialty.