

# 10 SIMPLE STEPS TO FINDING YOUR PRACTICE MANAGEMENT SYSTEM

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There is no one perfect practice management system - just the right one for your practice or billing company. Here are 10 steps to ensure you end up with a solution that's right for your office.



## Step 1: Decide which functions you want to automate

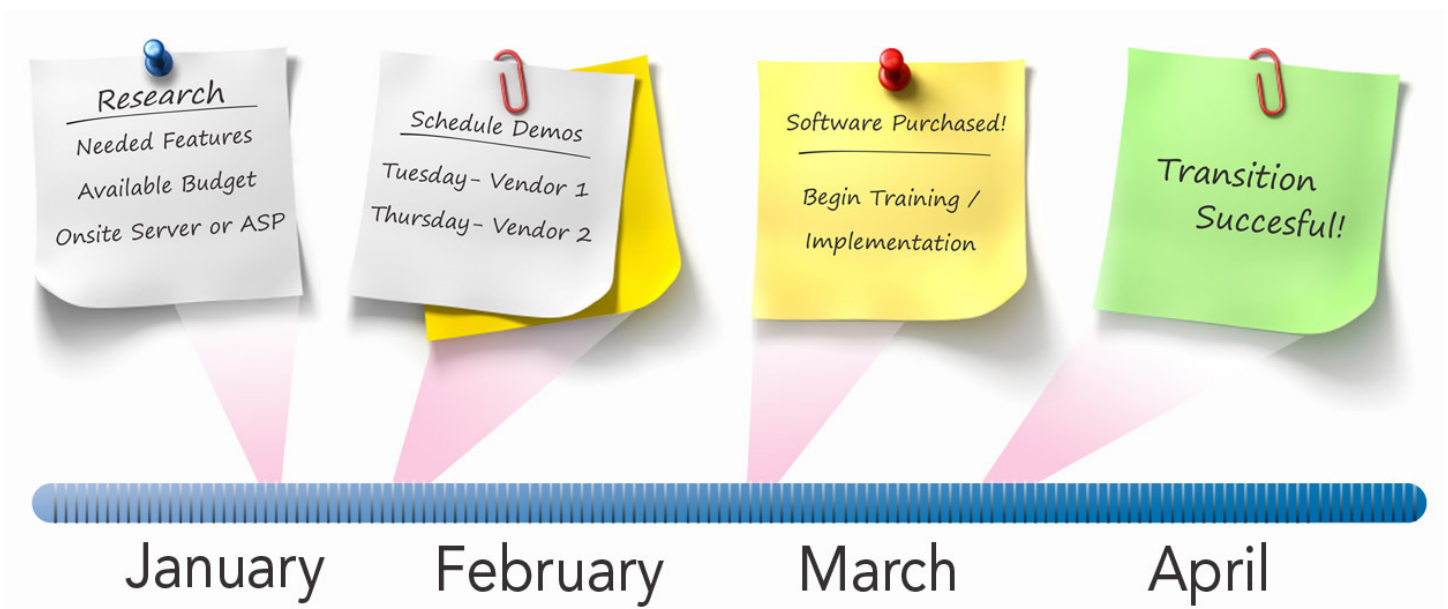
Are you just looking for a scheduler or are you looking for software that handles billing and reports and analysis as well? Do you want to go completely paperless and get an integrated practice management system and electronic medical record? Decide your list of priorities and make sure you have set a corresponding budget.

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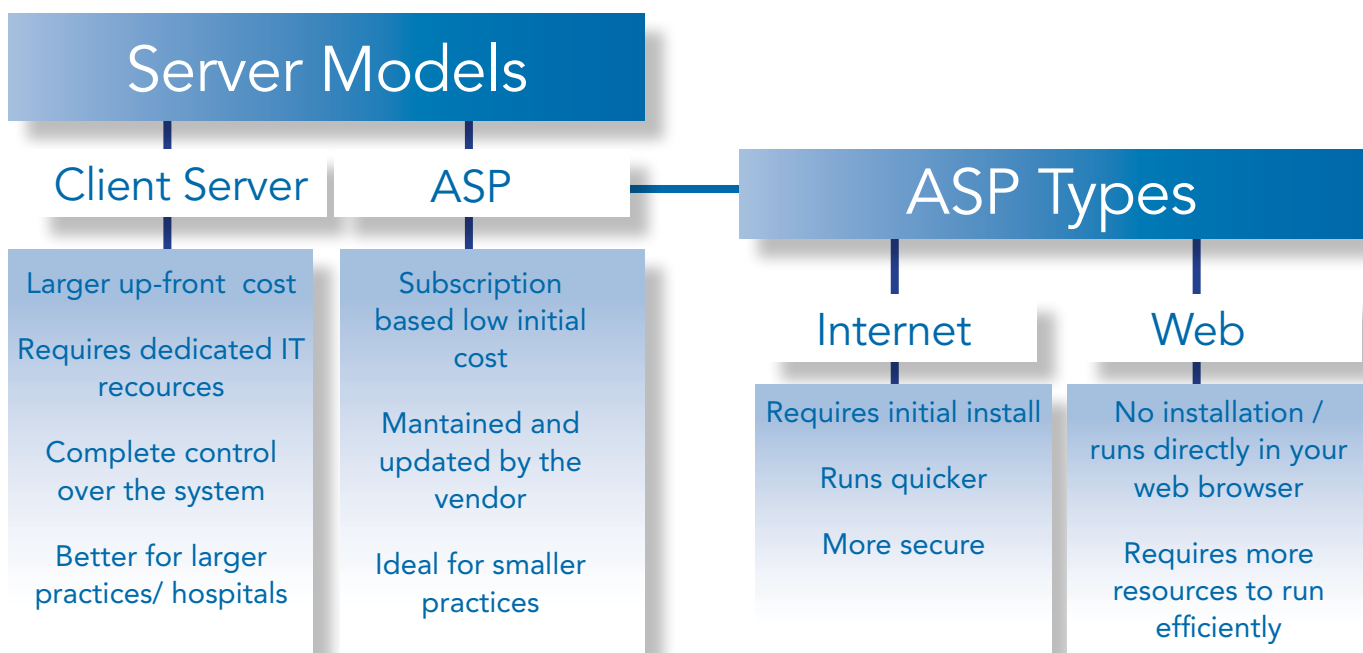
## Step 2: Set a realistic timeline

Doing research takes time, and you will probably want to view a couple of demos and get other people's input within your practice before making a final decision. Even when you have bought the software, getting staff trained on it and implementing it is likely to take at least a month. Try to leave enough time to make sure your staff is comfortable with using the software before they have to start using it on a day to day basis.



## Step 3: Decide if you want an on-site server model or an application service provider (ASP) model

This is a key question and will narrow down the list of vendors that you consider. On-site servers (usually known as “client-server models”) require a much larger up-front investment, dedicated IT resources, and more responsibility for backups and upgrades. Some larger practices prefer the complete control that on-site servers give them. ASP models are subscription-based, with a much lower up-front cost (which is great if you have budgetary constraints, although over the entire life of your practice management system you are likely to pay about the same for either model). These types of systems tend to be well suited to smaller practices that don’t have an IT staff and don’t want the hassle of maintaining a server. If you want to be able to access your notes and records outside the office, ASP software is probably for you. There are a couple of different types of ASP technology: Internet-based and web-based. Internet-based software, which creates a direct link between you and your data rather than transmitting it via the Web, has better security capabilities.



## Step 4: View more than one software demo

Make a shortlist of software that seems to meet your needs and set up two or three demos. Compare the features that you like and dislike. Get input from the different staff members that would be using the system – care providers, the office manager, billers and reception staff. Some staff members may have different levels of comfort with computers, so it's wise to choose a system that is intuitive and easy to use. Don't be afraid to ask lots of questions!

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## Step 5: If you want to file claims using your practice management system, be sure to ask shortlisted vendors if they are HIPAA compliant

Electronic medical billing involves transmitting protected health information (PHI). If your practice bills, it is considered a “covered entity” and is bound by a set of legal requirements called the Health Insurance Portability and Accountability Act (HIPAA), which concern the measures you take to keep patients’ PHI private. It’s important to ask software vendors if their practice management software is HIPAA compliant and what measures they take to keep up to date with these regulations as they change.



## Step 6: Ask about training and support

Find out how much training you get starting out, how much it costs, and how established the training program is. Do they have training manuals and online resources that you can access for free if you need a refresher? What happens if you get a new staff member? What do they estimate your “ramp-up” time to be? Similarly, find out if support is included in the price and of what quality the support services the vendor offers are. What hours can they be reached? Is it phone-based support only? Do they have e-mail and instant messaging support as well?



## Step 7: Ask about upgrades and maintenance

Don't make the mistake of assuming that upgrades and maintenance are included. Often, if you choose an ASP model, upgrades and maintenance of the system are handled remotely, and sometimes even for free. But if you choose a client-server model, you should find out if there's an upgrade and maintenance package and what processes are in place to fix the hardware, should you have any problems with it. One particular upgrade that is currently on the minds of many practices and billers is the transition from ICD-9 codes to ICD-10 codes, which is due to take place by October 2013. This will cause major problems for some practice management systems, so find out if your chosen system can handle the changes and whether the necessary upgrades will cost you any money.



## Step 8: Think about what your future needs might be

Are you hoping to expand in a few years, or add providers? Might you even add an additional location? Some practice management solutions are more scalable than others, so ask your shortlist of vendors how they would handle these types of changes and how expensive it would be.

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## Step 9: Make your final decision

By this point, there might be a clear winner, but if opinion is divided in your office, don't be afraid to ask for another demo and make sure all key decision-makers are there to watch it. Draw up a scorecard and give each application marks out of 10 for each area that's particularly important to you. Remember to distinguish between priority features for your office (whether you can submit secondary electronic claims, for example) and features that would be nice but that are, in the grand scheme of things, unimportant (an address auto-fill function from the zip code, for example). Tally the scores and make a final assessment.



## Step 10: Remember the reasons you're making these changes

Adapting to new processes and workflow will require an adjustment period. Be prepared for the transition to take a little extra work and remember the reasons you decided to automate in the first place. If you make time for training before you try and "go live" with your new practice management system, you'll avoid most of the stress.

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