

HOW TO
OPTIMIZE
your practice

**TASKS &
WORKFLOWS**

To remain independent, your private practice needs to run like a well-oiled machine, delivering quality patient care while thriving financially as a business. Physicians, front office and back office personnel all play critical roles. Most small practices can't afford a large staff, so it's important that those you do employ work as efficiently as possible. This guide looks at staff roles and responsibilities and more effective ways to streamline their tasks and workflow. Delineating, delegating and combining tasks not only helps you run a productive, financially viable practice, it can also create a better patient experience from check-in to follow up. Read the guide, **"How To Optimize Your Practice Tasks and Workflows"** to learn how you can enhance patient experience and improve your office productivity.

Finding the right number of staff to efficiently perform the tasks needed to run your practice is difficult. Hire too few and you've got front office chaos which can lead to long wait times, disorganization and unhappy patients. Hire too many and you're taking on additional employment costs. It's a delicate balance. To optimize your practice tasks and workflow, it's good to identify, which tasks require a human touch and which are better accomplished using more effective solutions. This guide looks at staffing, roles and responsibilities and more effective ways to streamline their tasks and workflow.

Front office staff, back office clinical support and physicians all need to form a cohesive network of care. "The physician-patient relationship is still at the core of the practice but other staff members are playing increasingly important roles in fortifying that tie and contributing to the overall patient experience."¹ How efficiently each staff member performs their tasks affects the quality of patient care, the progress of workflow, and the financial wellbeing of your practice.

By reviewing tasks and workflows, you can identify areas that are labor and/or time intensive and look for solutions to make them more efficient. There are two types of workflow: 1) how patients move through the system; and 2) how information is gathered, stored, and recovered like clinical information, insurance, and billing. To improve your workflow, you'll need to look at both of these areas.

Streamlining front office administrative tasks

Front office staff are the face of your practice and are responsible for creating that critical first impression for patients.

- Scheduling & appointments
- Preparing forms
- Getting patients to complete forms
- Keeping information organized and easily accessible
- Creating charts
- Collecting payments
- Verifying insurance coverage and reimbursements

If this list of tasks isn't managed well, it can create backups in workflow, longer wait times for patients, and clinical disorganization. This can all lead to a financial backlash: unhappy patients who won't return or make referrals; missed opportunities to collect balances due and insurance co-pays; and costly time delays that occur when searching for misplaced or incomplete information. Improve your front office workflow by freeing up your staff to do what they do best—acting as a personal point of contact for patients. The administrative paperwork and time-intensive searching for information should be left to technology. Let your front office staff take care of patient flow and let software-based practice management, EHR and billing solutions handle the flow of information.



The most productive way to improve your front office patient flow and information flow is to leverage existing technology.

Use technology to improve front office task flow

The most important thing you can do to improve your front office flow is to move away from old, paper-based systems for managing your practice. “The principal goal when implementing a health information technology solution in the office is to transition from a “batch and queue” system to a system that exhibits continuous flow. Most paper-based physician office systems have piles of charts in various places (batches of charts) waiting for something to be done with them (in-line or queued). Computerization should make this older system disappear and will replaced it with a continuous flow system where information is available everywhere in the office simultaneously and can be acted on immediately anywhere in the office.”²

The most productive way to improve your front office patient flow and information flow is to leverage existing technology. “Technological advancements in healthcare, such as the electronic health record (EHR), provide self-employed physicians with many options for improving the overall quality and efficiency of patient care.”³ Advanced EHR, scheduling and practice management software can take the tasks that slow you down and interrupt your workflow and automate them to create a smooth and seamless front office experience.

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Optimize your scheduling

Patient scheduling is one of the most important operational systems in your practice for the delivery of care: for physician, patient and staff satisfaction, and for practice profitability.⁴ It's important to maximize patient appointments and minimize the downtime that happens when patients fail to show up. More practices are turning to leading practice management technology to increase their efficiency with scheduling. An electronic scheduling and appointment system can make sure your practice is operating at full capacity. With efficient management, you may even be able to schedule a few extra appointments each day, which could be a welcome boost to your bottom line.



AdvancedScheduling has a comprehensive suite of functions to organize your scheduling: at-a-glance schedule management, scheduling tools that can help you overbook, manage waitlists, easily search for next opening, and set recurring patient appointments, and a system that uses cloud technology that lets you access and manage your schedules from anywhere.

Use a patient kiosk to complete forms

The great thing about a patient kiosk is that it takes work off the plate of your office staff and gets the patient to pitch in and help. “The patient not only has more autonomy with regard to medical decisions, but is now put to work entering his or her history to be reviewed at the time of the office visit.”⁵

AdvancedPatient has a check-in kiosk with user-customizable patient forms to give you multiple workflow options for your practice. You can assign forms prior to appointments via a secure patient portal, saving precious time and freeing up your front office workflow. With an iPad check-in kiosk patients have the option to read, edit and sign faster than the old clipboard and pen method.

AdvancedPatient has a check-in kiosk with user-customizable patient forms to give you multiple workflow options for your practice. You can assign forms via a secure patient portal to be completed prior to the appointment or by giving the patient an iPad at check-in, saving precious time and freeing up your front office workflow.

Back office tasks

Back office tasks are focused on delivering high quality clinical care. The role of medical assistants, LPNs and RNs in the back office is to support preparation for each appointment and contribute to the care of patients. Back office tasks include:

- Preparing exam rooms
- Assembling clinical information such as charts, lab reports or x-rays
- Answering patient questions about medications, prescriptions and appointments

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When caring for your patients, a complete and accurate health record is critical. Missing or lost information is not an unavoidable consequence of a busy medical practice. Incomplete medical records can be costly for both the patient and the physician. Physicians who have complete and accurate documentation provide better care for patients. The ability to quickly review chronic health conditions, potential drug interactions, or allergies can prevent dangerous, even life-threatening, mistakes. Additionally, physicians need access to complete lab reports or referring doctor's notes when considering the best plan for treatment. Precious time can be wasted when staff end up doing double data entry or pulling information from different systems, and jumping through hoops to pull together the knowledge required for the best patient care.⁶

How to optimize back office tasks

Charting that is maintained in a cloud-based system gives several users the ability to refer to charts and information from a secure, single sign-on. When patient information is stored in a secure site that can be accessed via the Internet, it creates interoperability among a wide range of systems. Cloud-based services give back-office staff the needed flexibility to review charts or renew prescriptions anytime from a laptop or mobile device.

AdvancedEHR streamlines workflow for the practice and enables intelligent work delegation to maximize practice efficiency. AdvancedEHR clients benefit from our AdvancedCloud and AdvancedMobile iOS app to make your documentation tasks more manageable and better organized. It's fully integrated with AdvancedScheduling and AdvancedBilling to make your software experience as seamless as possible.

This care management system can blend data from multiple sources and create interfaces for participating providers. It has been certified under strict standards to securely exchange patient health information with hundreds of connections into healthcare communities, including hospitals, labs, imaging centers, state immunization registries, public health departments, and health information exchanges.

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“The use of mobile, cloud and new communication technologies can create a platform that can capture data from disparate sources, such as EHRs, wearables, clinical information systems, mobile devices and more. Pull it all together and a caregiver is given a holistic and real-time view of a patient's health on any device that is accessible to the patient, or other specialists as needed, for the best ongoing care.”⁷

EHR and practice management software are critical components to improving the financial performance of your practice. Moving your practice to the cloud will liberate you from the burdensome hidden costs of client-server software ownership while improving the way you practice medicine. AdvancedMD cloud medical office software gives you a comprehensive and unified ecosystem to automate and optimize clinical and financial outcomes.

Billing tasks

Billing is the most critical role for the financial health of your practice. Your billing staff is responsible for:

- Assigning proper diagnosis & billing codes
- Payor & patient billing
- Claims management
- Accounts receivable

If you rely on paper-based payment systems, you run the risk of interrupting your billing workflow. Each lost or incomplete charge slip represents significant loss of revenue. Additionally, hours of staff time is spent each day entering charge slips and tracking down missing information. If you have the ability to electronically capture charges for services rendered at the time of service you're going to streamline your workflow and increase accuracy.

AdvancedBilling guides you through the claim progression with checks and balances to ensure maximum revenue. Seamless data transfer lets charges automatically pass from the AdvancedEHR system, allowing the billing process to start immediately following the encounter without double data entry improving your workflow

How to optimize billing

AdvancedBilling lets you manage your entire claim process in one place. Our clearinghouse is robust and automates manual processes and improves workflow. Our proprietary ClaimsCenter creates auto-generated worklists, claims status tracking and centralized billing for multiple providers and sites. ClaimInspector automatically scrubs claims for potential errors so you can easily identify claim issues before submission. It runs more than 3.5 million edits on each claim for

CCI, HIPAA, LCD and carrier-specific requirements before the claim is submitted. As a result, you get a first-pass claim acceptance rate of nearly 100%. You are guided through the claim progression where adjustments and changes can occur with checks and balances to ensure maximum revenue. Seamless data transfer lets charges automatically pass from the AdvancedEHR system, allowing the billing process to start immediately following the encounter without double data entry.



Conclusion

Optimizing your workflow means performing several practice and patient-focused tasks almost simultaneously. This requires a serious amount of teamwork and technology. If you automate as many of your front office, back office and billing tasks as much possible, you can improve staff efficiency, their access to information and save time and money by eliminating inefficiencies in your workflow. The AdvancedMD suite of integrated practice management products have the features you need to automate staff tasks that take up precious time and to maintain smoother workflows. All this can be done with integrated practice management software solutions that can improve patient experience and your quality of care.

Learn more about why you'll love AdvancedMD

AdvancedMD technologies are used by independent physicians and their staff to optimize all areas of their practices. The suite includes integrated electronic health records and practice management, revenue cycle management, patient engagement, business analytics reporting, and physician-performance benchmarking. As you'd expect, our U.S.-based stellar service team supports each service and technology we offer. AdvancedMD serves an expansive national footprint of more than 21,500 practitioners and 500 medical billing companies.

Learn more about how AdvancedMD can shorten your task list and improve your workflows.

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