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When selecting a software package for your office, take your time and know exactly what you are looking for. There are many applications on the market today to choose from and the search can be intimidating for someone who is not savvy on the latest technologies. However, without having the technical knowledge, there are ways that you can make good decisions.

Obviously, technology is the way of the world now and we must join in or be left behind. After researching many products out there, the most important feature to a software application is the ease at which data may be entered and the ability to adapt to your own office workflows. Many times, end users will manipulate the software in ways to fit an office workflow that may actually make data entry more difficult, rather than easy and efficient.

Windows based applications are the appropriate choice today. If you are not familiar with the latest technologies in hardware, networking, and internet connectivity, you should consider hiring a technical person to guide you in making those decisions. Selecting the right hardware and networking system for your software is critical.

To begin your search for software, first make a wish list of what you would like to have in your system. Review your current practice systems and imagine ways that would enhance your overall ability to render service, if certain processes could be automated. Create a list of the current reports that you use on a regular basis. Identify information that you are not able to obtain and would like to have in order to better manage your business. Knowing exactly what your needs are gives you power and confidence to begin your search.

Contact other providers and find out which software packages

they are currently using. Ask the doctor and staff what their likes and dislikes are with regard to their system. After, you have identified the various packages to consider, contact each company and request a demo of their product. During the demo, have prepared a list of questions of desired functionality that you would like to see. A good way to find out how a system would work for your office is to create scenarios that you would like to see handled with that software. For instance, request that the vendor demonstrate entering a new patient that has both a primary and secondary insurance and has a 20% co-pay. Ask them to demonstrate charge entry and entering a patient payment.

Create scenarios that would encompass your entire system, from entering a new patient, and scheduling multiple appointments, to ledger functionality. Pay close attention to the number of screens and flow of the data entry through each scenario. Make sure that the system is not too difficult or cumbersome to handle the easiest tasks.

Reporting is a very important feature in a system. You want to look for a system that has good reporting capabilities. Many vendors have integrated the technology for Open Database Connectivity (ODBC), which allows the user to capture their data and implement other reporting software in order to create custom reports. This technology is also important for cleaning up data, if necessary, and fixing problems without having to contact technical-support.

A software application should be one that you can expand and grow with. Many packages offer "bells and whistles" that you may not think are necessary for your practice. Our industry is one that is constantly changing and, as your practice grows, these features may become important to you later down the road. Choosing a basic package to begin with may result in more expense later when your needs begin to expand.

When choosing the right company to enter into this important relationship with, you must understand the aspects of this company that will affect you. First, every company has a support department. Find out if the support is 24/7.

How many times per month, can you call for help? In addition, many companies offer different levels of support from very costly to relatively inexpensive. Your first year with a new software company is a time of growth and, sometimes, frustration. Good technical support is important and should be readily available. Many companies will also tailor a support contract that fits your budget. Support contracts normally include updates to the product that add additional features free.

Training is another major aspect when selecting a new software company. Most companies offer different packages for training that include onsite or modem training. Investing in extensive training will save money in the long run and relieves staff anxiety during the implementation phase.

Components to Practice Management Software:
Scheduler: When looking at automating your scheduling, make sure that the software is flexible. The software should be able to handle multiple work hours for multiple providers, with different days and times. The ability to create your own appointment types and set specific time limits to each can be important. Scheduling a patient should be simple and fast. A nice feature in a scheduler is the ability to block book multiple appointments and or cancel multiple appointments with out having to switch from day to day to enter each appointment. The ability to customize the views is also a plus. The system should allow you to create views that will display multiple doctors, single doctors, and daily and weekly views.
A good scheduler program should also possess the functionality to flag appointments to track cancellations and reschedules, print patient's appointments, and generate statistics.

Billing: The most important part of the billing system is the ability to generate clean patient statements, enter charges easily and accurately, and post payments per line item. Make sure that the system maintains a payor history for the patient and can handle multiple injuries or incidents for each without having to create separate patient accounts. When posting payments, make sure that you have the flexibility to create appropriate write- offs or adjustments. Payments should be able to link back to the specific payor who made the payment. All accounting reports are generated from the patient ledgers and, many times, how the reports are created can be confusing. During training, be sure that you understand exactly how the information is reported, to insure that you are getting accurate figures.

Make sure that the system has the capability to file electronically. Even if you are not currently filing claims this way today, it is likely to happen in the future. When generating bills, either electronically or on paper, the system should have a process to review all claims and check for missing information before sending out the claim. The process for fixing those errors should be user friendly. In addition, there should be a good way to track collection attempts and add notes to the system for follow up information.

Documentation: It is recommended that the software have both a practice management package and a fully integrated documentation package. As hard as it is to get rid of those paper charts, it is almost becoming a necessity with today's requirements for providers to prove medical necessity. An all-in-one package saves everyone time and money. There are very good systems with touch screen and voice recognition to simplify this process. Handheld devices have also improved this process for reasonably low costs.

Security: This is a very important factor in today's world with the HIPAA regulations. Advanced security features can add value to any system. The ability to control and user-functionality is extremely important. In addition, with electronic documentation, most systems can track who and when accessed any record. This feature is especially important to compliance with the new regulations.

Customization: Customization is the ability to change the program to meet your practice needs. When purchasing software, inquire about the flexibility for customization on both the practice management package and documentation package. Be aware that customization will result in additional fees.

Pricing and Costs: Software applications usually price the software with a base price that includes one-to-five users. Additional user licenses will add to the cost of the software. Purchase the amount of users you currently have and add a couple more to leave room for growth. Purchasing licenses later can result in higher costs, so it is better to plan now than pay later. Support contracts can vary. Structure a support contract that works for you. Make sure that there is a true value to their contract, such as upgrades. Training is one area that you do not want to skimp on. The more training your staff has, the better they will adapt to a new way of doing things. New systems can be very intimidating to staff who are not comfortable with change.

In summary, when selecting a new software vendor, choose a reputable company and gather references. Know what you want and educate yourself on all of the many options available. Make sure that the software is user friendly. Always remember to purchase a software that will grow with your practice and enhance your overall service delivery and profitability.

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