

# Selecting the right Practice Management Software



“The system you select could empower or inhibit your organization for years to come. Do invest the time to understand the technology options. Choose a software that aligns with your business strategy”

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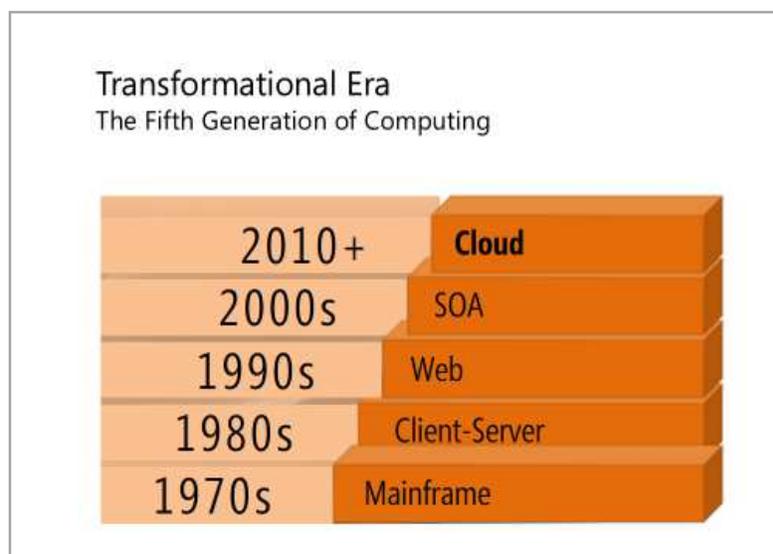
Selecting a software is now more important than ever. The wrong choice can become a frustrating and costly exercise.

Many companies focus on mouse clicks, data entry screens or specific features. Don't get me wrong! These features are all important considerations that impact the everyday use of a software. Both Case Management and Practice Management Systems (PMS) have evolved to the point where a software system has to be simple, efficient and feature-rich to survive.

Here are nine important considerations when selecting your next software.

## 1. Technology

Over the past 30 years, computer technology has become transformational, moving from Mainframe to



Cloud (private and public). The expected domination by tablet computers will no doubt speed up the transition to more mobile computing. There are generally three types of applications available:

- A. **Client-Server applications** use a designated server with the client installed locally on a client computer or through a Terminal Server such as Citrix. The company is responsible for securing and installing the server, maintenance, updates, backups, antivirus, and generally requires a technical support person.
- B. **Web applications** use a web browser as the client that connects to a remote server. The recent surge of web technology has made this option ubiquitous although not in healthcare. Web applications have a higher level of complexity and lack some of the capabilities and experiences shared by native applications. Integrations are more challenging and costly.
- C. **Private Cloud (Hosted) applications** use the internet to access applications and data installed on remote servers, instead of an application (or program) residing on your local server or computer's hard drive. Thus, companies do not have to invest in local servers, concomitant equipment and technical support services. Private Cloud technology is endorsed by eHealth, Canada Infoway and

by an increasing number of companies in both private and public sectors. *See schedule for cost comparison 1.*

Many older PMS programs were built on the client-server model. These programs are unable to meet the increasing demands for mobile access, technology enabled services and flexible care treatment programs. Increasingly, client-server systems are being replaced with newer technology that provides anytime access, greater mobility and broader functionalities.

The technology you select now should be valid for the next 7-10 years. Therefore, selecting a technology that will endure the short to medium-term changes in healthcare delivery is essential, if your software is to remain efficient and viable.

Both Web and Hosted PMS require an internet connection.

Many internet providers guarantee a 99% uptime. Thus, the internet is as reliable as your power supply or phone system. Today, most banking and commerce depend on the internet to function. Internet-based PMS is the 'now' not the 'future'.

## 2. Healthcare trends

The Healthcare industry is moving towards mobile, technology-assisted and enabled services.

- Healthcare is shifting to more home-based and flexible care, requiring greater mobility and flexibility from the healthcare provider. Flexible care implies working outside of normal operating hours. Thus, a software that provides mobile, anytime access is an essential tool.
- Increased client participation, video-based training and treatments, home-based assignments, etc., are already in the early adoption stage. Within 3-5 years, most of these services will be considered the new standard for the industry. Your software must either have these capabilities or, at the very minimum, have a supportive architecture.
- The industry anticipates a shortage of Providers. The implication - companies will encounter increased challenges in attracting and retaining good Providers. Mobile and flexible access to client files, access to technology-assisted or enabled treatment services and flexible scheduling are ranked by Providers as key considerations when selecting an employer. Having these capabilities within your software could play a key role in staff retention.
- Microsoft projects that in 3 years, the preferred computing device for Providers will be a Tablet. This requires a system that facilitates a secure connection (SSL) and full access to client files- another key consideration in software selection.

## 3. Document encryption

*“Medical records must be stored in a safe and secure environment to ensure physical and logical integrity and confidentiality.”*

HCF are required to maintain client records for at least 10 years, which could include several pieces of medical records, reports, emails, letters, etc. There are two general storage options used by PMS systems.

- A. A **built-in (integrated) storage** option allows you to store documents within each client record. The disadvantage of this approach is no offline access to your client documents. This approach has several advantages:
  - Efficiency: All documents are stored and retrieved directly from the client record.
  - Security: All documents are encrypted for added security.
  - Reliability: All documents are automatically backed up.
  
- B. An **external storage** option stores documents outside of the PMS system on a local computer or server. The principal advantage is easy offline access to documents. External storage is very common in older PMS and has several disadvantages:
  - Efficiency: The user must manually create/locate a client folder in order to save or retrieve client files. Users may have hundreds or even thousands of folders.
  - Security: Generally, documents stored in this manner are not encrypted.
  - Reliability: Generally, documents are manually backed up.

File security and efficient access to documents are critical considerations in selecting a PMS system. A built-in document storage option with full encryption provides superior PHI security, greater efficiency and reliability.

#### **4. Payer and other Integrations**

Healthcare is also moving towards greater integration. Payer integration simplifies billing by placing all your billing and financials onto a single system - making it more efficient and profitable to work with in different sectors. Integrations such as Microsoft Office, QuickBooks, Tablets and Phone calendar reduce errors and redundancies.

All MVA claims must be submitted through HCAI in Ontario. A full integration with HCAI allows a health provider to submit plans, monitor balances and submit invoices. A partial or no integration forces the provider to login to HCAI's website, to submit plans, and then monitor these plans and balances manually. This is time-consuming.

Telus Health launched a new integration program which allows PMS to bill directly to the Extended Health Insurance (EH) companies. With eight major insurance companies enrolled into this program, Telus Health plans to migrate the entire EH billing to an electronic billing format (a system similar to HCAI) over the next 3 years. Telus Health also introduced a similar integration system for WSIB which allows PMS to bill the Telus Emergis system directly.

CCAC integration currently includes referral management and invoicing. Clinical reports, which are mostly submitted via fax, are expected to be upgraded to a secure transmission method within the next year. A PMS that is fully integrated with CCAC can save a company 15-30 minutes per client, per month.

Healthcare costs are driven by labour cost; thus, each minute saved shows up in your bottom line. Integrations - Payer and productivity - make good business sense and are important considerations in your software selection. *See Schedule 2*

## 5. Software provider log-in access

There are two compelling reasons why each provider should have secure, electronic access to client files or company PMS.

1. Compliance - each provider should have and use a unique login credential to access and record changes, administrative or clinical, to their client files. This practice is recommended by PHIPA for transparency and accountability. A common login shared by two or more persons violates PHIPA requirements.
2. Efficiency, accuracy and cost savings. There are equally compelling business reasons in favour of providers' access to a company's PMS. Let's compare two scenarios.

### **Provider has no access to PMS**

Laura (OT) has no access to her company's PMS. She gets all her clients' information by phone, fax or email. Laura does her OCFs on HCAI or via an Excel spreadsheet, which she sends to the office for an assistant to re-enter. She books her appointments on Google, which the office is unaware of and sends back clients' treatment details via email or fax. An admin assistant inputs all this information into the PMS (and creates an invoice or OCF). Laura keeps track of her time separately and submits her timesheet to the office every two weeks.

Most of the information shared between the office and Laura are recorded twice, once by the office and once by Laura. This approach has a high level of duplication, inefficiency or recurring costs; has greater opportunities for errors; and the company's PMS has only a partial record of the client's treatments.

### **Provider has access to PMS**

Lisa (OT) logs into her company's PMS, accesses her assigned clients, reads notes, medical files, service request(s), etc. She contacts her client and books an appointment, which can be seen by her office, and syncs it to her smartphone for easy access. She prepares and submits an OCF plan (which can be reviewed by the office) using the PMS. Lisa records her billable and non-billable time and clinical notes directly to her client's file. An admin assistant (who has access to all Lisa's entries) generates an invoice (pre-filled from the entries made by Lisa) and submits it to HCAI or the client. Lisa or the admin assistant runs a bi-weekly compensation report to determine the timesheet hours for Lisa.

The information shared between the office and Lisa are recorded only once, either by the office or by Lisa. This approach has lower recurring costs, fewer opportunities for errors, a higher level of efficiency, and the company's PMS has a more complete record of the client's treatments.

***Giving your therapists access to their clients' files can save the company 15-30 minutes per client every month. A saving of 30 minutes per month pays for the PMS access.***

Thus, selecting a PMS system that empowers providers with secure access to their assigned clients have significant advantages. Since the cost of operating most practices are driven by labour, every dollar saved goes directly to your bottom line.

## 6. Secure File Transfer

Healthcare organizations routinely engage in the transference of confidential health information to third parties. The predominant methods of transference used today include faxing, emailing, or a password

protected document. Companies also use free consumer or file sharing services, such as Drop Box. Unfortunately, none of these methods of transference meet the regulations set out by PHIPA, which stipulates that confidential health information must be transferred through a secure file transfer process.

Companies investigating a software have two file transfer options:

- A. A software that has an integrated file transfer program. This approach has several benefits. First, it is efficient since you don't have to login to a third party program. Second, all tracking information remains in a single program and easily accessible. Third, it is flexible as you send or receive transfers using the same software or the web.
- B. A third party program, using a locally installed program or web-based application. Third party programs may have more options and charge less but do consider the time required to login and send, receive or track transfers which makes this choice less efficient.

Securely transferring confidential files is not optional but should be a high priority when selecting a software.

## 7. PHIPA Compliance

Health information compliance is not an option! It is mandatory!

The proposed [EPHIPA](#) will build on PHI security and impose significant new responsibilities and higher penalties on "prescribed organizations". A compliant software must provide, inter alia, the ability to:

- Segregate client files and limit access to files (to assigned Providers).
- Offer a lockbox option that restricts certain aspect(s) of a client file.
- Provide an audit trail and electronic logs, among other requirements. See the [proposed amendments to PHIPA](#) for a detailed list of the changes.

Are all PMS software PHIPA compliant? The short answer is no. Most scheduling software are not.

A non-compliant software exposes your clients' PHI and your business, an incalculable business risk with punitive penalties. Even more, your clients expect their information is duly protected. Compliance considerations should be central to your software selection.

## 8. Business intelligence

Information is power! Access to information is empowering!

Hence, it is imperative that everyone in the organization has the information required to effectively fulfill their mandate. Such information influence decisions on which marketing program to engage, what treatments or videos to prescribe to a client, which clients have fallen off, etc.

Business Intelligence (BI) provides historical, current and predictive insights into business operations. The goal of BI is to unlock the inherent value of business data, providing high value information for effective decision making. Add a predictive technology, and you may get a clear illustration of patterns, trends or problematic areas that require attention.

As a result, your software evaluation should look at a range of BI capabilities - interactive and ad-hoc reporting, reports from combined data sets, single click dashboard reporting options, single click drilldown into any data, comparative time or monetary-based analyses, or key performance indicators (KPIs).

A great PMS software is more than a client database, it provides high quality insights into your business operations. Accordingly, BI capabilities should be mandatory in your software selection.

## 9. Cost Evaluation

A few years ago, a company looking to deploy PMS software would have invested a large cash outlay to acquire and setup the software, with an added service or maintenance contract. The introduction of software as a service (SAAS) changed this approach, allowing companies to pay a small setup cost and a monthly licence fee.

The cost of deploying software varies depending on the technology, package and vendor. Below are the common services required for the proficient operation of any software.

- **Licensing:** Most software are sold by 'licensed use' or the right to use a software on one or several computers. Software vendors use different marketing approaches. Some companies license computers (Client Access License or CAL); some license users; and others license a location or the entire company.
- **Hosting:** Some software is hosted by the software vendor in a secured data centre; others are installed on a hosted or local server provided by the company. If the server is provided by the company, additional equipment and services are also required - antivirus, firewall, UPS and other redundancy equipment.
- **Document storage:** Some vendors provide an integrated document storage option; others provide a limited option; and most do not offer document storage, forcing a company to provide its own storage.
- **Data Backup:** Some PMS vendors provide full data backup (database and documents), some partial, and others none. If there is limited or no backup, the company will need to contract a separate secured storage facility. Documents stored on an on-site server must be stored and backed up separately from the client file. This process involves additional time to store and subsequently find these documents.
- **Software maintenance:** This service provides bug fixes and software updates as technology, equipment or regulation changes.
- **Software upgrades:** Upgrades include new functionalities developed as a result of new technology or innovation. Some vendors include this in their licence fee, others offer upgrades for an additional charge.
- **Technical Support:** Support services assist the user with specific software problems. Some PMS vendors include technical support in their package, others charge a fee.
- **Electrical:** The cost of running a server may vary from \$25-60 per month.

- **Training:** Software training promotes proficient use. Training may include initial training, training on new functionalities and training for new staff. PMS vendors provide training ranging from full training to no training, or training for a fee.
- **Data inputs:** Some software by virtue of their design have more data entry input. Duplicate entries may be a result of poor design or lack of certain functionalities. If providers cannot update client files, this task must be done by support staff, resulting in a duplicate recording of the same information.

Many PMS vendors provide only a portion of the services listed above. Other services are purchased separately by the company deploying the software. Here are two common approaches used.

**Client-Server Model** – The PMS vendor may provide the software, maintenance, updates, technical support and training. The company deploying the software provides the server and accessories (backup, antivirus, firewall, UPS and other redundancy equipment), and document storage. Although the licence cost charged by the PMS vendor may be \$20-25 per user, the overall cost per user could exceed \$40.

**Vendor-Hosted Model** – A Vendor Hosted Model offers a bundled service approach for a setup cost and monthly fee. A bundled approach can include all of the services listed above. If you choose a full service approach, you may pay \$30-40 directly to the vendor.

When all costs are considered, the two systems are comparable in price. However, the scalability, security, efficiency, accessibility and flexibility of the Vendor Hosted system is superior, especially for organizations seeking external access or a more mobile solution.

## Conclusion

This paper is not intended to be an exhaustive piece on PMS software selection. Its objective is to highlight some of the important considerations very often overlooked in the PMS selection process.

Since each HCF is unique in its combination of service, clientele and business culture, each of the aforementioned consideration should be assigned a relative weight in the final evaluation, except for compliance which should always remain the highest ranking. Do note that the proposed EPHIPA amendments have doubled the fines for breaches. Worse, in today's social media driven environment, the risk of a PHI leak could ruin the goodwill of a business.

You may find it more beneficial to select the technology that is appropriate for your company, and then proceed to look at the features you need. This way, you don't invest hours watching demos or reading materials on products that are not compatible with your preferred technology.

Good Luck!

### About the Author

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