





Practice Operations Health Check: Get 'er done before 2020!

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Elizabeth Monroe, Principal, COE, CPSS, PHR 

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|  | TITLE <i>Principal and Senior Consultant</i> |
| | ABOUT Ms. Monroe joined BSM in 2013 and is based in Phoenix, AZ. Prior to joining BSM, she spent nearly eight years serving as the Chief Operations Officer for a large, multi-subspecialty ophthalmology clinic in Florida. |
| | AREAS OF EXPERTISE In her current role, Ms. Monroe provides ongoing support to ophthalmology and medical aesthetic practices. Specifically, she offers assessments and continuing assistance in all facets of practice operations, including: <ul style="list-style-type: none"> • Flow and Efficiency • New Physician Integration • Human Resources/Labor Law • Staff/Management Training • Front Desk Operations and Patient Acquisition • Employee Satisfaction Surveys |
| | PROFESSIONAL ACCOMPLISHMENTS <ul style="list-style-type: none"> • Recurring customer service columnist, Ophthalmic Professional magazine • Chairperson, Masters in Ophthalmology practice manager program • Frequent contributor, speaker, and panelist for the American Society of Ophthalmic Administrators (ASOA) and American Academy of Ophthalmology (AAO) |
| | CREDENTIALS AND CERTIFICATIONS Certified Ophthalmic Executive (COE) Certified Patient Service Specialist (CPSS) Professional in Human Resources (PHR) Gallup-Certified Strengths Coach |
| EDUCATION Master of Arts, Rice University Bachelor of Arts, Florida Southern College | |

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Webinar Objectives




**Review operational areas
to consider for
a great 2020!**



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**“You get 1 point for thinking
about something.
You get 9 points for actually
doing it.”**
Walmart Executive



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COMPLIANCE TRAINING: ARE YOU CURRENT IN STATE AND FEDERAL REQUIREMENTS?



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OSHA





1. Initial and annual training
2. Practice manual detailing policies and procedures
3. Bloodborne Pathogens Standard
4. Hazard Communication Standard
5. Spill kit / Wash Station
6. Hepatitis B Vaccination Policy




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HIPAA

Health Insurance Portability and Accountability Act

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|--|--|--|---|
| <p>Initial and annual training</p> <p>HITECH Act</p>  | <p>Business Associates Agreement for vendors with access to Protected Health Information (PHI)</p>  | <p>Notice of Privacy Policy (NPP)</p>  | <p>Information available for patients</p>  |
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Fraud, Waste, and Abuse

Initial and annual training


Free resources available on www.cms.gov






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Medicare Assignment



- OIG Exclusion List
- Medigap Language
- Compliance Plan
- Billing and coding chart audit (every 1 – 2 years)
- MIPS reporting (if necessary)







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FRONT DESK OPERATIONS



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Create *Awesome* Systems

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|  <p>Recalls</p> |  <p>Patient Outreach</p> |
|  <p>Availability with providers</p> |  <p>Relationships with referring providers</p> |



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CLINICAL OPERATIONS



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Monitor Patient Wait Times

- Use real data
- Conduct time studies
- Brainstorm with team for bottlenecks in processes



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“The answers are within your four walls.”

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Clinical Training



Medical assistants, technicians, scribes, patient care coordinators

Systematic program for onboarding new employees

Structured, ongoing training from vendors and providers



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BUSINESS COMPLIANCE



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Business Compliance


3rd-party
Insurance Contracts

Medicare
Credentialing

Provider
Credentialing

Consent paperwork
for surgeries





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FINANCIAL COMPLIANCE



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Reports you should review and understand:

- a. Profit and Loss Statement (Income Statement)
- b. Balance Sheet
- c. Monthly benchmarking
- d. Accounts Receivable Aging Report
- e. Provider Productivity
- f. Product inventory report and analysis



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ACTION PLANS



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Action Plans

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Practice Name
*Operational Action Plan: Developed **Date***
*Last Updated: **Date***

Items Needing Priority Attention

| Action Item | Responsible Party(s) | Status | Timeline | Notes |
|----------------------------------|----------------------|--------|----------|-------|
| <i>Last Updated: Date</i> | | | | |

Medium Priority Items / Additional Considerations from BSM's Operational Assessment

| Action Item | Responsible Party(s) | Status | Timeline | Notes |
|----------------------------------|----------------------|--------|----------|-------|
| <i>Last Updated: Date</i> | | | | |

Additional Considerations
 Additional items added for consideration in follow-up communications with the practice.

| Action Item | Responsible Party(s) | Status | Timeline | Notes |
|----------------------------------|----------------------|--------|----------|-------|
| <i>Last Updated: Date</i> | | | | |

COMPLIANCE

| Action Item | Responsible Party(s) | Status | Timeline | Notes |
|-------------|----------------------|--------|----------|-------|
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QUESTIONS?

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