



NEW PRACTICE PACKAGE

WHAT TO KNOW WHEN OPENING A NEW PRACTICE

Opening a new practice is a big undertaking; we collected useful information and a few key recommendations to help out as you embark on this journey.

It can be helpful to establish a plan to execute your first steps in the proper sequence, once you know which tasks are prerequisites for others. This helps keep your startup on schedule and helps avoid costly delays. We hope the information we collected here can help you make key start up decisions with confidence and in a timely manner. Our team can help eliminate the headaches of opening a practice so you can enjoy the personal

and professional satisfaction that comes with this exciting stage of your career.

Amazing Charts Medical Practice Consultants are here to help! Enclosed, please find the following reference materials to assist you with what you should know and be aware of when opening your new practice. To learn more, please contact us for a free New Practice consultation.

Call 866.382.5932
for your free
New Practice
Consultation

OPENING A NEW PRACTICE? WHAT WE'LL COVER

- Start-up Checklist
- FAQs
 - Things to consider when selecting an EHR
 - The 5 W's of Credentialing
 - How to market your new practice
- Client Success Story
 - Dr. Aaron Way, Osteopathic Family Medicine, South Kingstown, RI
- White Paper - Pitfalls to Avoid When Opening a New Practice
- White Paper - Bold Marketing Ideas to Attract New Patients

OPENING A NEW PRACTICE CHECKLIST

1. Determine the Business Model and Entity Type

- Decide whether you want to go solo or work with a partner
- Office selection and setup
- Insurance vs. cash based/fee for service?
- Business structure (incorporation)
- Payroll tax registration and payroll processing
- Administrative setup
- Will you employ a medical biller or use an outside service? (if a solo practice -our recommendation is to use an outside biller for the first six to 12 months)

2. Obtain credentialing and contracting

- This process can take 90 days or more, so you should begin submitting applications to those private health insurance companies well ahead of your target opening.
- Regardless of who you're applying for credentialing with, it's wise to gather all the documents you'll need and convert them to PDF files to store on your computer. That way, you'll be able to access and share all of your paperwork quickly.
- You could be entering into long-term contracts, so it's imperative you do your research before these negotiations to make sure you're getting the best deals possible.

3. Select an EHR (they do improve patient care and outcomes, and they're valuable tools for keeping you organized and compliant).

- Will you need a cloud based EMR or do you prefer office hosted?
- Is the EHR cost effective, expandable, easy-to-learn and easy-to-use?
- Do they offer a free trial?
- Do they offer some free training?
- Do they have implementation specialists familiar with new practice startup? Do they offer Practice Management software or billing options?



4. Based on the EHR you select, what kind of hardware/equipment/tools will your new practice need?

- Frugality is a good idea when you're just getting started. Don't fall into the high overhead trap.

5. Establish operations, compliance and HR procedures

- Determine how many staff members you'll need to help you run the practice.
- Make sure you're training staff on best practices for avoiding expensive HIPAA violations, and verify your EHR system includes certain security features to provide additional protection.

6. Train your staff on how to use the EHR

- Efficient use is essential for productivity

7. Develop your marketing and patient loyalty plan

- Establish an online presence as soon as possible.

8. Make sure your vision for your practice matches reality

- Determine what you need now and what you can grow into (for a solo practice, our recommendation is to use an outside biller for the first six to 12 months)

STARTING A NEW PRACTICE FAQs - THINGS TO CONSIDER WHEN SELECTING AN EHR

Q: What should I look for when selecting an EHR?

A: There are many EMRs on the market, but only a handful are developed for small to mid-level practices. You should schedule a demonstration of the software to make sure it meets your needs.

Q: How much is going to cost?

A: You want something not too expensive, as you are trying to build your revenue stream and not go broke in the process.

Q: Is it hard to learn? Do they offer some free training?

A: You want to find an intuitive system familiar to your workflow, so you can hit the ground running. Free training at the start can also help round out any questions you have and make you more comfortable.

Q: Do they offer a free trial?

A: You want to be able to try the system before you buy it. Like test driving a car, getting your hands on the system before purchase allows you to truly understand the layout and how easy it is. You also want to try the full system, rather than a limited version, so there are no surprises.

Q: Do they have implementation specialists familiar with new practice startup?

A: Once you have started working with a salesperson from an EMR company, ask them if you can speak to an implementation specialist regarding getting started. Usually, this person can serve as a consultant to help you create a plan on running the practice and ensuring you don't overspend on services or hardware you do not need.

Q: How Will You Handle Billing?

A: One of the biggest considerations when starting your new medical practice is how you will be paid. Some business owners prefer to start with a "Cash Pay" option, where your patients pay for each visit as they come in. Others choose to hire an internal biller who manages payments through a practice management software. Many choose to use an outside billing service to manage claims. Have a conversation with your implementation specialist to determine which option is best for you and your practice.

Q: How Will You Host Your Data?

A: Another item to consider is how best to host your software. Many practices are moving to cloud based or cloud hosted EMRs. Others are sticking with the conventional "Office Hosted" option, where your database is stored on your practice's main computer or server. Discuss what option is best for you with your implementation specialist.

Q: What kind of hardware / tools will your new practice need?

A: Again, your implementation specialist will help you determine what hardware would be required to make your office run smoothly. It is very important to know what software and tools you will be using in your office prior to purchasing hardware so you do not overspend or buy equipment not suitable for your needs.

THE 5 W'S OF CREDENTIALING

Q: Who applies for credentialing?

A: Typically, this would be the office manager who completes the forms on behalf of the provider, or the provider themselves. They can also utilize a hired credentialing company.

Q: What is credentialing?

A: It is the process in which the provider participates with insurance companies to submit claims and receive payments.

Q: When should I begin the process?

A: They should begin this process as soon as their Tax ID and Group NPIs are assigned. Medicare payers typically take the longest, so it should be the first payer to start.

Q: Why do I need to be credentialed?

A: Providers could be faced with claim denials for being non-participating, or could be paid out of network, causing the patients to have larger out of pocket expenses.

Q: How long does it take?

A: Medicare payers take the longest, as the average time is 90 to 180 days. Medicaid payers take about 90 days. Other Blue Shield or Commercial payers typically take 45 to 90 days.

For more information on marketing your new practice, please refer to our white paper, "Bold Marketing Ideas to Attract New Patients."

HOW TO MARKET YOUR NEW PRACTICE

Q: Why Is Medical Marketing So Crucial Now?

A: According to Managed Healthcare Executive, one of the four trends healthcare professionals need to follow is the rise in consumerism. Far from being the passive patients of yesterday, who continued to go to the same physician as their parents, today's consumers want to be more in control of their healthcare choices. Medical Marketing is crucial because it helps to build awareness to meet the patient's need.

Q: How do I build a strong Healthcare Marketing Mindset?

A: Because you are creating something that could very well affect the financial future of your medical practice, here are some guidelines to establishing your marketing mindset:

- It's an investment, not an expense
- You offer solutions, not services
- Don't just be busy, be mindful
- Quit doing the same thing
- Remember, you're a doctor, not a marketer

Q: What are some Marketing ideas to help attract new patients?

A: While you may know the fundamentals of website design, search engine optimization and social media marketing, here are some bold marketing ideas to help your new medical practice grow:

- Have a website that really works
- Work with large local employers
- Communicate, educate, motivate

DOCTOR TRANSITIONS FROM PARTNERSHIP TO SOLO PRACTICE USING AMAZING CHARTS

CHALLENGE: STARTING A SOLO PRACTICE AFTER PARTNER RETIRED

- Complex Documentation → “We were using multiple PM systems to collect and track clinical data.”
- Inefficient Workflow → “In the past, I have used EHRs that involved too many clicks for one simple task.”
- Staff Training → “I had to hire new staff, so the less training needed to use an EHR, the better.”

SOLUTION: AMAZING CHARTS EHR

- Ease of Use → “There was no need to spend lots of time learning how to use Amazing Charts.”
- Seamless Integration → “The interconnectedness with our local labs, radiology, and pharmacies really helped me run one clinical system and track data better.”
- Users Supporting Users → “At an Amazing Charts Users Conference, a colleague shared a valuable shortcut in the system that saved me a significant amount of time.”

RESULTS

- ✓ Dr. Way owns a successful osteopathic family practice in Narragansett, RI
- ✓ Runs independent practice instead of working salaried hospital job
- ✓ Focuses on quality of care rather than quantity of patients seen in a day

AVOIDING PITFALLS WHEN OPENING A NEW PRACTICE:

A STEP BY STEP GUIDE FOR STARTING YOUR MEDICAL PRACTICE SUCCESSFULLY

STEP 1: WHERE TO BEGIN / CHOOSE AN EMR WISELY

You are looking to open your new medical practice, but don't know where to begin. You have your office space picked out, and now you need to set it all up. But where to start? First, you should decide on an EMR (Electronic Medical Record) to run your practice. There are numerous things to think about when looking. You want something that is not too expensive, as you are trying to build your revenue stream and not go broke in the process. You also need software that will grow as you grow. Finally, you want something easy to learn and use. As you already are heavily involved in starting a new business, you don't want to get bogged down with a difficult EMR startup.

- Cost Effective
- Expandable
- Easy to Learn
- Easy to Use

There are many EMRs on the market, but only a handful that are developed for small to mid-level practices. You should schedule a demonstration of the software to make sure it meets your needs. When choosing one, please consider the following:

- Do they offer a free trial?
- Do they offer some free training?
- Do they have implementation specialists familiar with new practice startup? Do they offer Practice Management software or billing options?

“After using other EHR programs in a group practice, I opened a solo practice in 2012 and have used Amazing Charts since the beginning. It has been a reliable, user friendly, intuitive EHR from the start. Although I initially had doubts about how effective a remote tech support would be, those fears were immediately dispelled...beginning with installation.”

— Mary Oot, Nurse Practitioner East Syracuse, New York

STEP 2: DETERMINE YOUR NEEDS

Once you have started working with a salesperson from an EMR company, ask them if you can speak to an implementation specialist regarding getting started. Usually this person can help as a consultant to help you create a plan on running the practice and ensure don't overspend on services or hardware you do not need. There are several things to consider as you startup.

- How will you be billing (insurance vs. cash based / fee for service)?
- Will you employ a medical biller or use an outside service?
- Will you need a cloud based EMR or do you prefer office hosted?
- What kind of hardware / tools will your new practice need?

How Will You Handle Billing?

One of the biggest considerations when starting your new medical practice is how you will be paid. Some business owners prefer to start with a "Cash Pay" option, where your patients pay for each visit as they come in. Others choose to hire an internal biller who manages payments through a practice management software. Many choose to use an outside billing service to manage claims. Have a conversation with your implementation specialist to determine which option is best for you and your practice.

How Will You Host Your Data?

Another item to consider is how best to host your software. Many practices are moving to cloud based or cloud hosted EMRS. Others are sticking with the conventional "Office Hosted" option, where your database is stored on your practice's main computer or server. Again, please discuss what option is best for you with your implementation specialist. They will help you determine what option will be right for you, as well as what hardware would be required to make your office run smoothly. It is very important to know what software and tools you will be using in your office prior to purchasing hardware so you do not overspend, or buy equipment that is not suitable for your needs.

STEP 3: OPENING YOUR PRACTICE

Now that you have chosen your EMR, determined your billing option, established what tools / hardware and additional software you need, now it is time to put it all together. You may decide to hire an IT person to set up your computers and network for you, or maybe you can set up your computers yourself, and have your ISP (Internet Service Provider) configure your network for you. Then you can reach out to your EMR sales executive and implementation specialist to set up and

install your software package(s). You should schedule your new staff people to come in and work with your implementation person to get you and the staff trained and ready to go. Some EMRs offer some free training options (webinars, videos, etc.), and others may offer paid training options (onsite or remote) as well. Once all of your equipment is installed, and you and your staff are trained, you are ready to open.

Please allow us to be the first to congratulate you on opening your new practice! If you need any assistance with starting up, please contact us. We have Implementation Specialists / Consultants that will be happy to help.

AMAZING CHARTS – AFFORDABLE SOLUTIONS FOR GROUP PRACTICES

Amazing Charts, a Harris Healthcare Company, is a software developer in the small group practice vertical with products that include Practice Management software for patient records, scheduling, billing and claims submission and Electronic Medical Records which house the patient visit, medications, diagnosis, and allergies information. We also offer multiple add-on options for better patient care such as CQM, Patient Notification, Patient Payment Options, CCM, Patient Engagement and Patient Care Gaps software.

Our company provides self-directed training, personalized training, online webinars and in-depth Customer Support for all aspects of program implementation and utilization. Look for regional educational/user conferences to help users realize maximum user results from all the Amazing Charts products.

We offer a range of solutions for any practice regardless of size, specialty or budget. We offer a low cost – easy to use basic option as well as multifaceted systems to manage all the components of your office structure.

We're here to help every step of the way, so don't fear the process! Reach out to get started now.

GROW YOUR PRACTICE:

BOLD MARKETING IDEAS TO ATTRACT NEW PATIENTS

What is it about the thought of “advertising” that sets the medical world on edge?

For some time it was simply just not allowed. Then it somehow became unseemly. It was even thought to be gauche to put out information about your practice so that potential patients might be able to decide whether you could help improve their health!

How backward is that? Wouldn't it just seem to make sense to let people know how you can help them? Despite the many well-known benefits of advertising, or implementing an in-depth marketing plan, many physicians and medical practices are still reluctant to promote their own capabilities. They might feel uncomfortable about it, they might think they don't have the time to develop a plan, or they may somehow still believe that it is not worth the effort. Despite these misgivings, perhaps it is time to rethink medical marketing in the words of the master of advertising himself, David Ogilvy.

"I do not regard advertising as entertainment or an art form, but as a medium of information."

— David Ogilvy

If the man who became known as the father of advertising should choose to look at his creative communications as a way of transmitting information, then that is how the medical community can reframe its thoughts about marketing as well. Instead of just putting out that a practice exists, the medical professional who seeks to share information with potential patients will be better positioned for future growth.

Medical practitioners have witnessed an upheaval in the way patients choose their providers. While some decisions are forced upon them by insurance companies, most patients have become actively involved in their own medical care selection process. Some may choose to leave a long-term association if they feel they are underserved, and those who need to find a new medical partner may use online and social media sources to first gather information.

Certainly the primary concern of the practice should be to provide a high level of care, but then it is crucial to invest the effort into continuously letting the target patient population know how your practice benefits them. As the medical community evolves into a patient-centered focus, its marketing

must also adapt to that direction. Standing out should become paramount in the face of increased communication efforts from hospitals, medical centers, and other providers.

The fact is that today's medical consumers are more likely than ever before to turn to their online resources when in need of medical care. They want to find a practice in their search results, gather helpful information from a website, and receive assurances that the facility has a positive reputation among family and friends. Once interest is aroused, and a patient relationship is initiated, they expect an exceptional degree of care, but also want to have a high level of education, engagement and communication.

This white paper will demonstrate why marketing is crucial for practice success, outline some mindset musts, and provide some bold ideas that will help attract new patients. An effective marketing strategy leads to the ability to attract more patients, and then engage them in solid communications. Patients who are connected are less likely to leave, and more likely to provide positive reviews about your capabilities. All of this can result in dramatic practice growth.

WHY IS MEDICAL MARKETING SO CRUCIAL NOW?

According to Managed Healthcare Executive, one of the four trends healthcare professionals need to follow in 2019 is the rise in consumerism. Far from being the passive patients of yesterday, who continued to go to the same physician as their parents, today's consumers want to be more in control of their healthcare choices. Those practices which are not able to clearly delineate their features and benefits will not be able to attract a sufficient stream of new patients to generate any real practice growth.

So how will medical consumers differentiate which of the many available practices can help meet their specific needs? Healthcare marketing is crucial because it helps to build awareness to meet the need. The problem with traditional advertising is that you never know exactly when a patient is going

to be searching for a qualified medical professional with your specific capabilities. Therefore, it is important to have an ongoing and searchable presence, as well as a strong testimonial base, so your practice will come to the forefront when there is a need.

In addition to attracting new patients, a strong marketing program can help to strengthen relationships with current patients and shore up the existing patient base. It can also affect the practice's ability to attract top-quality personnel. Just like the internet-savvy patient, medical professionals are also searching the internet to find information on their next job opportunity.



BUILDING A STRONG HEALTHCARE MARKETING MINDSET

Because you are creating something that could very well affect the financial future of your medical practice, here are some guidelines to establishing your marketing mindset:

- **It's an investment, not an expense:** Don't look at marketing at a necessary evil. Look at it instead as an investment in the future growth of your practice and you will be making much better decisions about what you want to do.
- **You offer solutions, not services:** Many medical professionals get so caught up in the nuts and bolts of what they do that they forget to tell prospective patients what it means to them in terms of better health and improved lifestyle habits.
- **Don't just be busy, be mindful:** Oprah has it right when she stresses "being in the moment," even if this applies to marketing. Don't think that you have a marketing plan just because your practice has a website and a Facebook page. It takes a lot more thought than that to build a purposeful communication strategy that connects with people you want to bring into your practice.
- **Quit doing the same thing:** "We've never done it that way" or "We tried it that way once and it failed" are not helpful statements when it comes to crafting a marketing plan. Think about what you continue to do the same way all the time and ask yourself if you are really satisfied with the results. Do you know for a fact that something will not work just because you haven't tried it before? Or, if something did not work, did you ask yourself why, make some adjustments and try again? Even the best of marketers are constantly testing A/B strategies to find out which one will work better at achieving their goals.
- **Remember that you're a doctor, not a marketer:** Remember the original Star Trek series where McCoy was always responding, "I'm a doctor, not a...(engineer, mechanic, bricklayer, escalator)"? Well, there was some ring of truth in that. With the right mindset of being open to new marketing ideas, it can be helpful to work with marketing professionals who can point you in the right direction, so you can concentrate on providing outstanding patient care.

BOLD MARKETING IDEAS THAT WILL HELP ATTRACT NEW PATIENTS

While you may know the fundamentals of website design, search engine optimization and social media marketing, here are some bold marketing ideas that can help your medical practice attract new patients:

BOLD IDEA 1: HAVE A WEBSITE THAT REALLY WORKS

Don't just settle for a functional website with pictures of your office. Make it work real hard for you:

- Contact information, practice specialties, and hours of operation must be front and center.
- Make it easy to make an appointment online.
- Have more videos and graphics than words.
- Include patient testimonials.
- Provide educational information.
- Solicit questions from current patients and answer them online.
- If you work with patients who have Chronic Care Management needs tell them how your practice keeps in touch and monitors their care more closely to better manage their conditions.
- Make sure the site works on mobile devices and can respond to voice searches.
- Above all, make sure you let them know you are accepting new patients!

Don't forget your technical capabilities. Prospective patients want to know you make the patient interaction easy. Let them know you have EHRs to make charting faster, more efficient billing practices that get more insurance claims paid the first time through, and a patient portal where they can gain access to their lab reports and test results. If you comply with interoperability standards, make sure they realize how that helps coordinate healthcare in a more efficient manner.

BOLD IDEA 2: PUT YOUR CURRENT PATIENTS TO WORK FOR YOU

Have you heard the saying that a satisfied customer is your best advertisement? That applies to medical marketing as well. There are professional ways of having current satisfied patients help spread the word about your practice:

- Will they write a letter or provide a sentence or two that you can use in print materials or on your website? Better yet, will they appear in a video?
- Do you make it part of the visit to ask current patients to refer your practice to their family and friends? Do they even know how? Do you at least have business cards they can use?
- Can you direct them to a review website where they can post positive remarks?
- Are there ways they can send an email or make a social media post about your practice that doesn't violate their confidentiality? Can you suggest points they can include?
- Can you sponsor an online webinar or in-person seminar on a topic of importance to your patients, and ask them to invite their friends?

BOLD IDEA 3: WORK WITH LARGE LOCAL EMPLOYERS

Employers have a vested interest in looking after the health of their employees. Turn to some local employers and find ways to help improve employee health. You might be able to offer lunchtime seminars, have onsite appointment hours, or provide information about injury prevention.

BOLD IDEA 4: COMMUNICATE, EDUCATE, MOTIVATE

Pay heed to the rise in consumerism and be the practice that participates. Provide information in your blogs, have an e-newsletter, work with local social media influencers who are interested in healthy living ideas, share a column with a local newspaper, get interviewed on local radio shows, or be interviewed on TV. Just make sure that people realize who is providing this valuable information, and they make the association with turning to your practice when they need medical assistance.

FOUNDED BY A PHYSICIAN FOR PHYSICIANS

Amazing Charts was founded in 2001 by a practicing family physician familiar with the challenges clinicians encounter on a daily basis. Since then, Amazing Charts consistently ranks as a top EHR for ease of use and remains an affordable option for medical practices. In 2017, Harris Healthcare acquired Amazing Charts to be the centerpiece of its healthcare group, which is comprised of several ambulatory care solutions.

With the acquisition, the **Amazing Charts family of products** has grown to include **Harris Caretracker, digiChart, Clinix, MEDfx, Pulse, and Doc-tor.com**. The wealth of knowledge from additional client practices and staff has only strengthened our overall understanding of the space.

Amazing Charts is here to stay. Harris Healthcare is financially strong, and it practices the “Family is Forever” policy, meaning it doesn’t sell companies it acquires. Being a part of the Harris Healthcare family also means that clients can take advantage of the “Software for Life” philosophy. Regardless of which solution clients choose, they will receive the same level of service, support, and long-term technology protection. This ensures clients keep pace with the constantly evolving healthcare technology field. Harris Healthcare also has a commitment to compliance to keep your practice up to industry standards.

Today, Amazing Charts provides physicians with solutions for Electronic Health Records, Practice Management, Medical Billing, Population Health, and more. Contact us to see how your medical practice can benefit!

We’ve helped many clinicians start new practices. Contact us today for a personalized consultation!