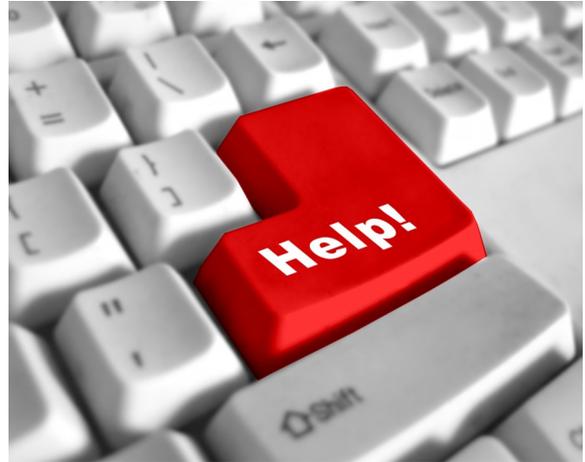


Shopping for the right EMR and billing software for your practice

Many therapists are grappling with the transition to electronic medical records (or EMRs, also known as electronic health records or EHRs) and electronic claims submission. To gain some insights into these issues, PTPN recently conducted a member survey regarding their experiences with EMRs and billing software services.

Members of PTPN can access the complete survey results by logging in at ptpn.com and clicking on “Business,” then “Better Business Practices.” The complete survey results for PTPN members include vendor-specific ratings and comments. Here are some of the themes that emerged in the survey responses:



- *Being able to integrate scheduling, documentation and billing*

Many members pointed to integrated software as the most important aspect they wanted in both EMRs and billing software (or the biggest failure, if they were not integrated). Having software that includes all three capabilities, or that can communicate with other programs, means less time on the computer and more time with patients.

- *The ability to customize*

Each clinic has different software needs. Vendors that worked with members to easily customize options and reports were more highly ranked than those that did not.

- *Compatibility with iPad or tablets*

Several vendors now offer access on iPads or tablets, which can allow patients (and clinicians) to enter their information directly into the system, rather than filling out forms on paper and having staff enter the data. On the flip side, however, members cautioned that some EMR and billing software require the purchase of new hardware and other expenses outside of the new software.

- *Access from multiple points*

Web-based software allows PTs access from any computer, even outside the practice. Keep in mind that if you use a system that relies on Internet access to log in and add notes, if your WiFi is out or their server is down, you won't be able to access the software.

- *Billing needs*

Members lauded software that created easy-to-understand statements, both for patients and staff. Software that had the ability to fax/email directly to referral sources or insurance companies was also ranked highly. Overall, members reminded their peers that much of the EMR software is still new and working out the kinks;

no software is perfect. Changing software (even upgrades with the same software) can create a steep learning curve even for familiar processes.

Once you've found a few vendors that seem to fit your clinic's needs, do some research on each vendor and its software. Here are a few examples of questions to ask (members may access the complete list of questions in the survey results report online):

1. What is the vendor's track record? Look for answers to such questions as:
 - a. How long has the vendor been in business?
 - b. How long has the particular product been on the market?
 - c. How many live sites are currently using the product?
 - d. Will the vendor provide customer contact information so you can speak to current users?
2. What is the implementation/training process? Does the vendor provide on-site training, web-based training, and/or other options?
3. Is the product fully compliant with HIPAA and other legal/regulatory requirements? Does the vendor do ongoing product development to stay current with such requirements? At whose expense?
4. What kind of ongoing support is available for the product? What's the size of the support staff? Hours of availability? Methods of contact? What are the support costs?
5. What are the vendor's data security policies and procedures? Where does the data reside? Who has access to the data?
6. What are the costs of the product? Is the cost per location, per user, or some other calculation? Are there separate costs for the initial data converting/importing, and for ongoing support, maintenance and upgrades? What are the costs for any required technology upgrades, including hardware, networking and internet access?

There are plenty of resources out there to help in your search. Here are two that we recommend:

YOUR PEERS

Talk to fellow clinic owners, both in your area and at local and national conferences. In many states, PTPN hosts Office Manager Association (OMA) meetings, where PTPN staff and administrators of PTPN member practices discuss pressing issues and exchange information. Attending these events (some of which are online) is a good opportunity to ask your colleagues about their experiences and recommendations regarding software vendors. Contact your PTPN Provider Services Representative or [local PTPN office](#) for more information.

PPS IMPACT

The APTA Private Practice Section magazine Impact frequently publishes an EMR checklist. The checklist details features, functions, price structure and more information for a number of EMR systems. Current and back issues can be found online at www.ppsimpact.org.