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# Office Management Software 101

By  
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**Introduction:**

Digital technologies and the integration of computers into administrative functions, diagnostics and fitting protocols offer tremendous advantages over previous methods. Technology has changed the way we practice, yet the goal of many professional practices is still to deliver the highest quality services and products at a competitive price, while maximizing profit and return on investment (ROI).

**A**lthough we often had the information we needed, we could not readily access it. Patients completed intake forms by hand, duplicating information we already had. "Thank you" and birthday cards were often deprioritized or forgotten entirely. Sometimes, each of us accidentally lost or misfiled charts, forever eliminating the patient's history, previous fittings, referral information etc. Sometimes we double-booked or failed-to-book, because we had no record of an appointment. Our forms, audiograms and purchase agreements were completed and filed by hand. Certainly our referring doctors were unimpressed by our mediocre (if at all) follow-up reports.

Because we had 32 competitors listed in the local yellow pages, we needed to make a change to survive. We needed to get organized and present a professional impression to our patients, potential patients and referral sources. Like so many other people, professionals and organizations, we did not enthusiastically embrace "change." Adapting to unfamiliar technology is challenging, time consuming and costly. A successful transition requires a dedicated and focused effort. However, successful integration of technology provides time and cost savings, increased efficiency and productivity and improved patient care.

There are five primary advantages to successfully incorporating Office Management Software into your routine.

1. Patient Management
2. Target Marketing
3. Financial Health
4. Scheduling
5. Practice Valuation

**Patient Management:**

Your patients are likely "spoiled" when they call professional offices. Most professionals no longer place the patient "on

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*Ten years ago I struggled to get and stay organized. I kept patient information and "to-do" lists in Excel, financial details in QuickBooks, patient letters and notes in Word, and e-mail in Outlook.*

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hold" while a paper file is retrieved. Thanks to "Caller ID," the patient's record is usually in front of us before we answer the telephone. Patients appreciate quick and accurate, personalized answers. The computer takes fractions of a second to lookup battery size, warranty, next appointment and birthday information, allowing us to establish and secure a strong, personal bond with each caller.

While cleaning or repairing an unscheduled "walk-in" patient's hearing aid in the laboratory, all I do is enter the hearing aid serial number into the lab's database and our computer automatically retrieves the patient's name, address, last appointment, repair history and all other data. The patient never knows I forgot their name and the current repair is logged into their electronic chart.

It is essentially "effortless" for us to send routine correspondence. As most offices do, we send a thank you letter to the patient immediately after purchase. The letter automatically merges with customized data to give the letter a personalized look.

However, because it is so easy to send out appropriate and timely correspondence, we now send out notes after follow-up fittings, adjustments, clean-and-checks, repairs and other common visits.

With a modern database, you can record unlimited quantities of information about each patient, demographics, hearing instrument, chart notes, audiograms, etc. You can create a battery club, produce custom forms, letters and postcards, print files and mailing labels, order hearing aids, print HCFA 1500 insurance forms and you can accomplish a multitude of other common office tasks. Well designed office management software can handle the majority of your day-to-day secretarial, administrative and management tasks. Computers allow one staff member to perform like two and a half.

**Target Marketing:**

It is now easy to harvest the abundant yield your files offer. When patients and prospective patients are located in a database, you can quickly request and pull up a list based on any gathered criteria. For example, you can send a letter to each patient whose instrument warranty is about to expire, you can click a button to find, list and print a custom letter and even print an envelope. You can do the same for "clean & checks," recalls and even reminders for annual audiometric evaluations. You can search and gather information based on any gathered criteria. For example; birth date, zip code, warranty expiration, battery size, annual audiometric evaluation, manufacturer, last office visit and on and on. Target marketing saves you money, time, postage and labor.

There's no need to guess, or to assume which advertising campaign is best for your practice. Software can tell you how much income was received based on each marketing event, date, referral source, or any other factor. In essence, you can easily track

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which marketing effort was successful, and which was not.

For example: An office in Reno, Nevada held an “open house.” We mailed 10,000 pieces of mail. Four separate letters were mailed to 2,500 residents. Each prospective record was marked with a code to indicate the letter mailed. When patients arrived, we knew which letter motivated them to attend. As they left, we noted the visit outcome in the computer. When the open house was over, we simply clicked a single button to learn the outcome of each letter. We learned letter #1 and letter #4 were average. Letter number 3 was terrible, and letter #2 was excellent at motivating patients. This information prevents waste and lets you focus on what works in your market.

**Financial Health:**

Documents that can be produced by your software include;

- Amplification Documents; contracts, service, repair, battery, accessory, delivery receipts, return for credit documents, etc.
- Patient financial statements, insurance paperwork, invoices, etc.
- Commission and Closure reports, by professional, date, promotion etc.
- Detailed Cost Analysis for all products and services.
- Office Expenses (costs of doing business, payroll, quarterly filings with the IRS)
- Miscellaneous

Many software packages allow you to track sales and service in great detail. We can select a date range to determine the number of units sold, the average selling price, profit in dollars and profit in percentage for each product we offer. The report can show how many units were sold in total, or how many of Brand X, or Brand Y, and how many of a given model, or how many with directional microphones, etc. Of course, other reports could be generated based on office location, audiologist or any other parameter of interest.

**Scheduling:**

A paper-based “at-a-glance” book is a great way to schedule for multiple audiologists.

However, it is difficult for multiple users to view the schedule from other rooms and offices! Scheduling software on your computer network allows all employees immediate access to the schedule and it’s many intricacies. Double bookings and missed opportunities can be essentially eliminated. Testing rooms, office locations and professional staff can be scheduled and viewed from any Internet accessible location, using commercially available products such as [www.gotomypc.com](http://www.gotomypc.com), MyWebEx, ImInTouch and PCAnywhere, all of which can connect multiple offices with ease.

We color-code our appointments to provide an “at-a-glance” view of the day’s schedule. The color scheme helps staff prepare for specific types of appointments. We also use “editable” time blocks, preset in increments of 15, 30, 60, 90 or 120 minutes to facilitate quick and efficient scheduling. If a patient calls to ask when their appointment is, the computer finds the appointment in seconds.

**Practice Valuation:**

Eventually, almost every practice will be sold or passed along to new owners. The value of that practice can be hard to determine if there are only paper files. Nonetheless, a database can help quantify your most valuable asset — your charts and files. Charts and files can be organized in the data base to reflect last purchase date and dollars spent, the likelihood of purchasing another instrument this year, next year or the year after, and the possibility that the patient is wearing a competitor’s instrument, as well as it’s serial number and possibility of being replaced in the next month, year, or sometime after that. In other words, a well thought through database can tell help you contact the patient when they’ll need your goods and services.

It is not enough to offer a potential buyer the number of files in your filing cabinets and the value of your office equipment. A well maintained database can significantly increase the credibility of your asking price.

**Conclusion:**

Our customers have grown to expect high technology products, professional

services and administrative efficiency. Why provide digital hearing excellence on a foundation of analog office care? It’s easier and more affordable than ever to explore and obtain an improved professional future.

Many hearing aid manufacturers, as well as private and commercial organizations offer software specifically tailored for the hearing aid industry. I encourage you to speak with the manufacturers you currently work with to see what software options they may have available.

Through my research, I have determined the six most popular options are (listed alphabetically):

1. **HearForm™** (\$4,845.00) [www.hearform.com](http://www.hearform.com)
2. **PC/MacHear™** (\$2,500) [www.zooink.com/AGS/PCMH/Startup.html](http://www.zooink.com/AGS/PCMH/Startup.html)
3. **ProHear™** - Starkey (\$14,500 - \$7,200 upgrade) [www.starkey.com](http://www.starkey.com)
4. **Siemens Practice Navigator™** (\$4,995 Server & 2 workstations) [www.siemens-hearing.com/professional/softwareEquipment/office\\_management\\_software.aspx](http://www.siemens-hearing.com/professional/softwareEquipment/office_management_software.aspx)
5. **SycleNet Online Patient Management** [www.sycle.net](http://www.sycle.net) - \$199.00 per month (Per Office Rental Fee)
6. **Tims for Audiology with Online Claims™** (\$2,640 1 to 2 User License; \$4,800 3 to 6 User License - plus \$60.00 / month maintenance fee per location.) [www.onlineclaims.com](http://www.onlineclaims.com)

I encourage the reader to examine all options before signing up to purchase any particular software programs. I encourage you to speak with your trusted colleagues and associates on these matters. Often, the best referral comes from someone you know, in a similar situation to yours, who can relate their specific experiences, thoughts and analysis to you on these matters. ■



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