



# Optimizing practice management software

Purchasing a practice management system is a crucial investment aimed at boosting productivity, decreasing costs and helping to make better-informed clinical and business decisions. Such software acts as an essential member of the office team, and it is core to every OMS enterprise.

The cardiovascular system of a practice, every function depends on it to be robust and deliver the services needed precisely when they are needed. Practice management software has a far-reaching impact on the health of a business, and it is impossible to thrive without it. That's why it is essential to be certain about the right software for an organization.

There are some important considerations to keep in mind when equipping an office with a new system, upgrading the current system or evaluating alternatives. Explore key factors such as features, integration and automated processes to help evaluate how well a current or prospective practice management system fits the practice's unique goals and priorities.

## Key capabilities to consider

Getting the most out of a practice management system? The answer depends on a few key factors. The right practice management system should offer the tools needed to be successful, integrate with other software effectively and automate tasks to reduce the staff's workload. These capabilities all work together to support a high standard of patient care and an efficient, profitable practice.

■ **Integration** – When considering practice management systems, the key is to find software that handles tasks smoothly. Functions should integrate seamlessly with each other, so users do not have to jump between modules or reenter data manually. The entire software package should function as one coherent system.

■ **Features** – Most practice management software provides the basic functions that every office requires, including patient scheduling, charting, note-taking, treatment planning and billing. At a minimum, an OMS office should not be doing any of these tasks manually. Many software options even include functionality to automate letters, narratives, and vital-monitor and anesthesia modules.

■ **Automated processes** – To determine the system's efficiency, apply the following litmus test: Are processes manual or automated? If office employees are doing anything manually that the system or a connected service should handle, then resources are being wasted – usually in the form of staff time.

## Defining goals and priorities

With an understanding of key capabilities to consider, start bringing goals into focus and decide on priorities. While objective factors are important, the decision-making process should be more personalized.

For example, anyone who is deciding which car to buy will want to know its speed, fuel efficiency and safety features. But each person's relationship to his or her car will be different. For some, the car is simply a means of getting from point A to point B. Others may value it as a status symbol or way to explore the world. A vehicle should reflect what one wants to get from it, just as practice management software should fit the specific way in which the practice operates.

At its core, practice management software is the foundation that automates functions to improve efficiency and accuracy. But it should go beyond this basic purpose to support unique goals. If boosting profitability is the aim, it should provide tools to track and modify processes to reach that end. If dependent upon technology such as vital-monitor integration, the software should integrate such tools. And if a practice's team spends significant time tracking and managing referrals, its practice management software should offer features to streamline that process.

## Comparing different systems

If exploring more than one practice management system, take some time to visit their websites and compile a list of features. Consider categorizing them as relating to the front office, clinical tasks or business management. List them by the task they handle, rather than the name of the feature. Look first for the basics, such as scheduling, billing, treatment planning, and document storage and retrieval. Include a detailed list of monthly reports, such as production and case acceptance, insurance payment, aging and continuing care. Pay particular attention to imaging and vital-monitor integrations, along with treatment planning.

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The features list should be long and detailed. Once sufficiently compiled, sit down with staff and review how each task will be handled. After narrowing the list down to a few top picks, ask for a demonstration of any software being considered. This helps to avoid purchasing a product that lacks the functionality to accommodate workflows in the OMS office.

## Exploring software ecosystem

If planning to invest in practice management software, consider the services, partners and technologies that integrate with the system. Again, the best place to start is the practice management system's website. Look for solutions, partners and services. Components many practices consider to be essential include patient communication, billing and insurance claims processing in the front office. Many find that electronic medical and dental claims are the most important integration. In the business management category, consider tracking and managing referrals as well as patient acquisition tools such as online forms.

When evaluating the currently used practice management system, look at the capabilities in two ways. First, catalog the ecosystem components that have already been paid for and determine if they are fitting the practice's needs. Second, investigate all the components to which staff does not have access, or that have become available since the current practice management system was acquired. Care begins from the moment a patient learns about a practice and continues through scheduling, treatment and billing. With that journey in mind, the practice's job is to make the patient's experience as pleasant as possible. To do this, ensure the organization has access to all the ecosystem components needed – and make a plan to investigate and invest in any that are missing.

## Know what the vendor offers

Continued support for a practice management system is as important as the system itself. Consider whether team

members are receiving the assistance they need, and if the vendor offers the following:

- Flexible training on all of the system's components.
- Evaluation to ensure practice staff are utilizing full capabilities in the smartest way.
- Comprehensive, integrated services from both the vendor and its ecosystem of partners.
- Flexible support to ensure hardware remains capable with up-to-date software that has near-zero downtime.

If a software vendor does not offer these services, consider moving to one that does. Review each service during daily huddles to determine which team members should participate in each offer. Plan to take advantage of these offerings and follow up periodically to ensure progress.

Consider the cost of practice management systems in two ways:

- What is the lowest price to pay while still fulfilling all requirements?
- How can profits be increased beyond what the practice is paying?

If the goal is to run the basic functions efficiently, seek the most affordable software that serves that purpose. If the goal is to increase profitability and achieve growth, invest in a system that provides the tools to nurture patients, monitor and maximize profits, and to which services can be added as the business grows.

When using the right practice management system, an office should be able to cut manual tasks to their minimum and boost employee productivity to its maximum. An OMS office should be running smoothly with happy patients, consistent referrals and content employees. ■

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