Computers, Tablets, and The Cloud—Oh My: How To Inexpensively Facilitate the use of the Cloud And Computers/Tablets For Practice

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DESCRIPTION

This presentation will briefly review computer based and cloud based programs used to facilitate practice management. After the brief review, an in-depth, step-by-step approach to using the cloud, and your computer/tablet, to keep patient information, sync the information across your computers/tablets and implement free electronic billing all within a HIPAA compliant environment will be presented.

What We Will Cover

- Review computer based, web based and cloud based programs
- Using the cloud, and your computer/tablet, to keep patient information
- Sync your patient information across your computers/tablets
- Implement free electronic billing
- All within a HIPAA compliant environment

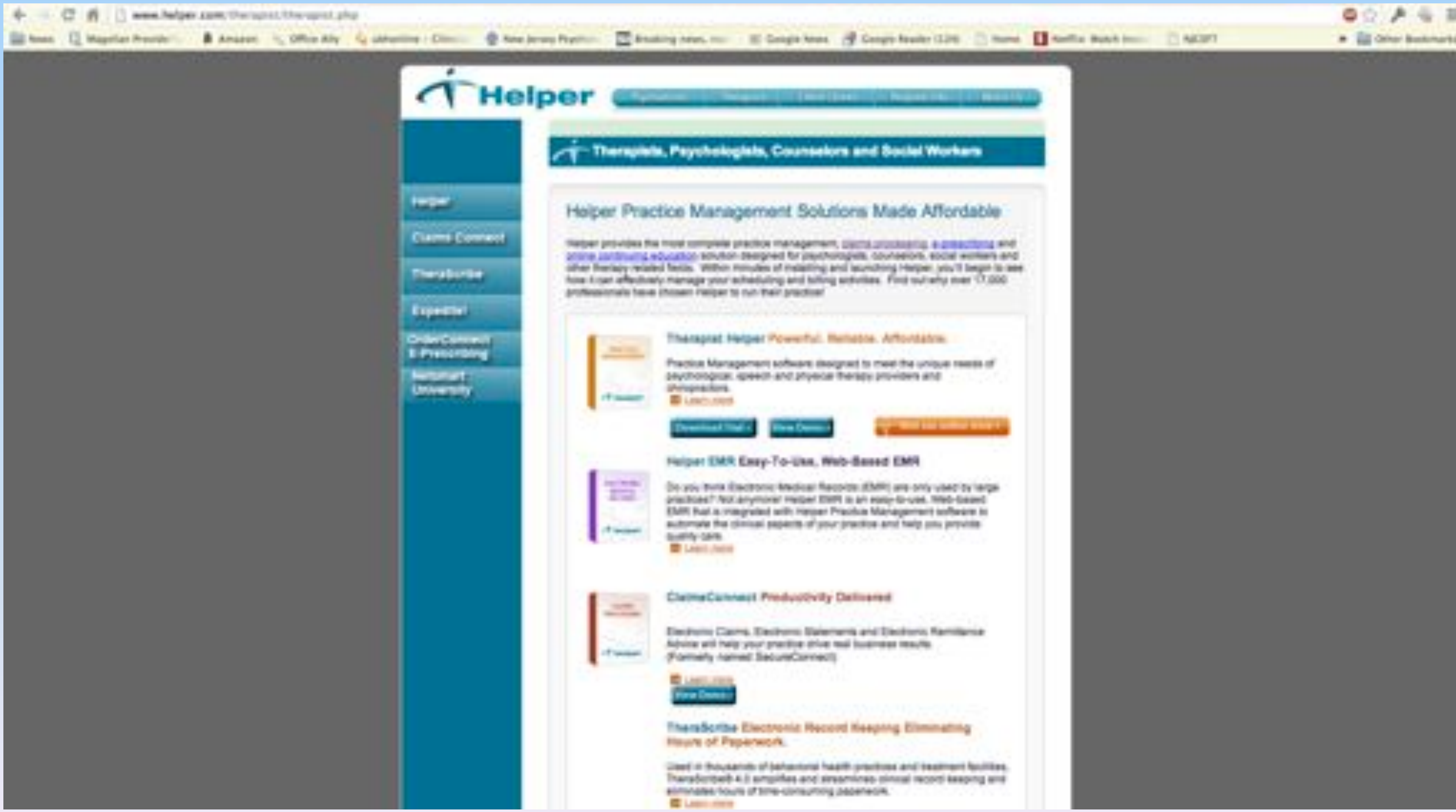
Learning objectives

- What are the similarities and differences among computer, web and cloud based practice management services?
- What are the advantages/disadvantages of using computer based, and web based programs for practice management?
- What are the advantages/disadvantages of using cloud based solutions?
- What is the cloud?
- What does it mean to sync folders and files?
- How to implement a HIPAA compliant, inexpensive cloud solution
- How to implement free electronic billing

Practice Management Software

- **Practice Management Software (PMS)** deals with the day-to-day operations of a clinical practice. Such software frequently allows users to capture patient demographics, schedule appointments, maintain lists of insurance payers, perform billing tasks, and generate reports.
- Most PMS systems are designed for small to medium-sized clinical offices. Some of the software is designed for or used by third-party medical billing companies. PMS is often divided amongst desktop-only software, client-server software, or Internet-based software.
- The desktop variety is intended to be used only on one computer by one or a handful of users sharing access

Computer Based Practice Management Software - Program is on your Office Computer



Computer Based Practice Management Software - Program is on your Office Computer

Computer Based Practice Management Software

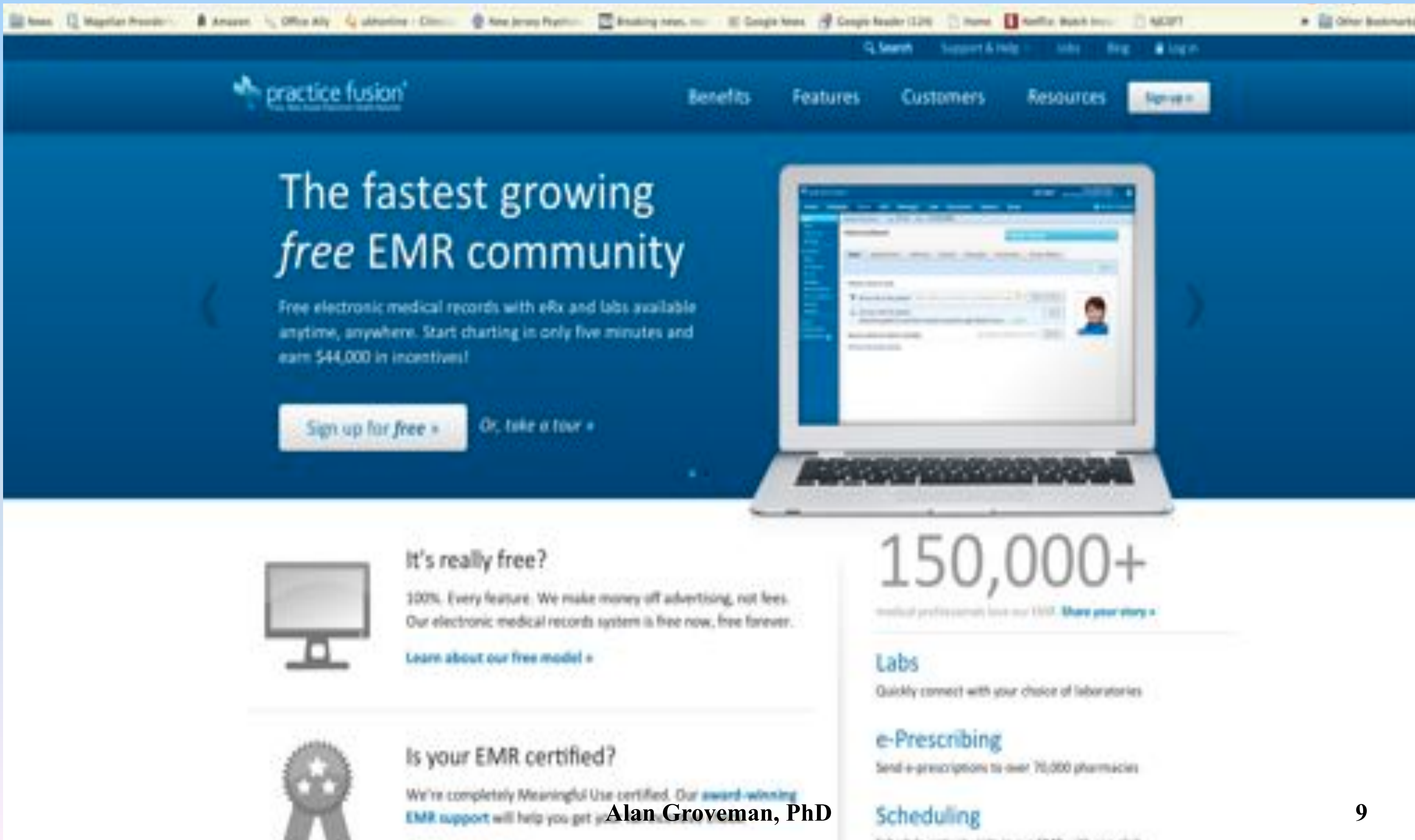
ADVANTAGES

1. Secure
2. Comprehensive
3. Established user base

DISADVANTAGES

1. Expensive
2. Steep learning curve
3. Need for updates – CPT changes, etc.

Web Based Practice Management Software- Use your Web Browser to Access



Web Based Practice Management Software- Use your Web Browser to Access

Web Based Practice Management Software- Use your Web Browser to Access

ADVANTAGES

1. Secure
2. Comprehensive
3. Established user base

DISADVANTAGES

1. Monthly expense
2. Who owns your records?

Cloud Based Practice Management Software- Use your Computer/Tablet/Smart-Phone to Access folders and files in the Cloud

ADVANTAGES

1. Secure HIPAA Compliant
2. You use your own forms (notes, spreadsheets, etc.)
3. Inexpensive
4. You own your records

DISADVANTAGES

1. Initial set-up time consuming
2. Not as comprehensive – separate patient records and electronic billing programs

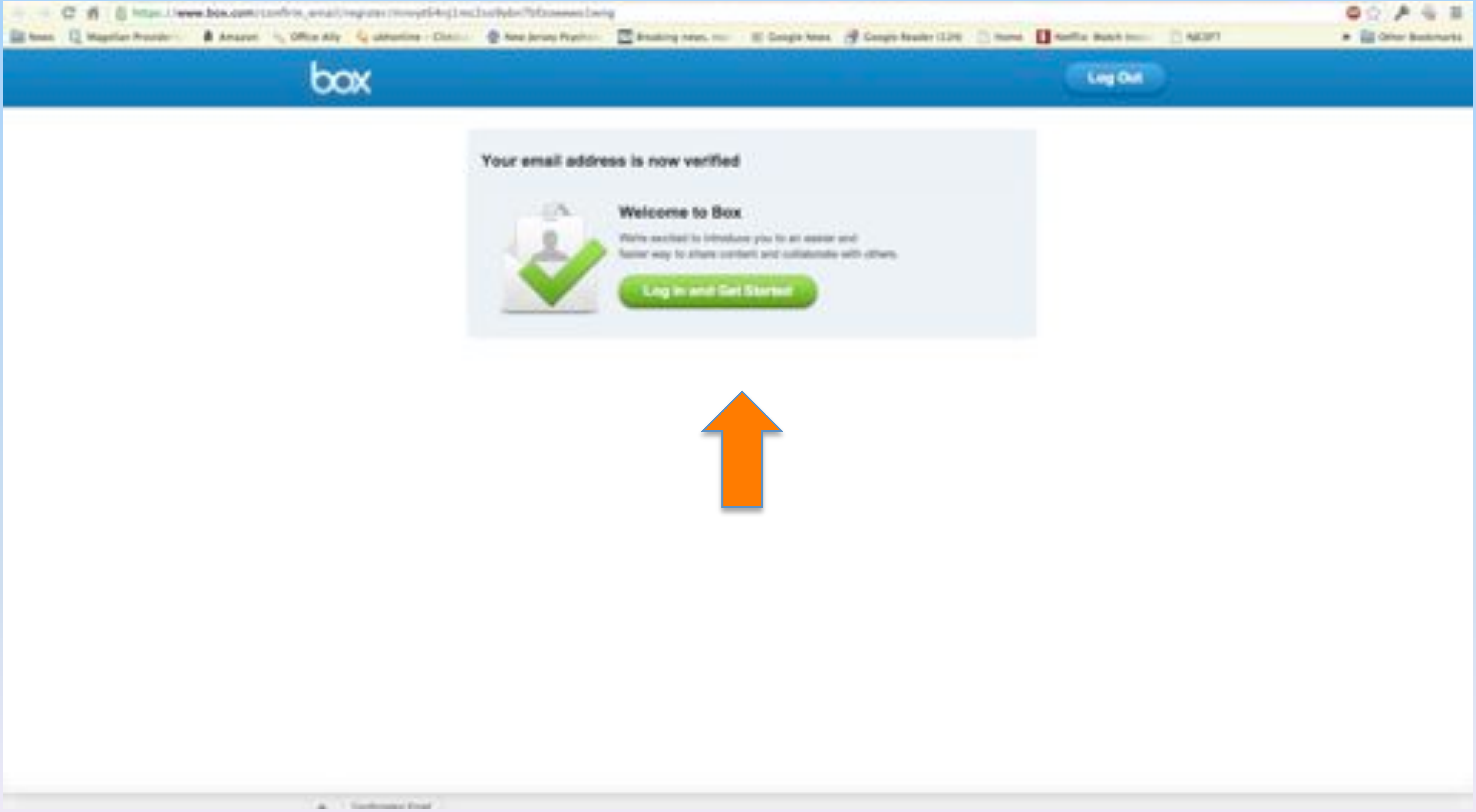
What is the Cloud?
What is Sync?

Implementing a Cloud Solution

1. On your web browser go to box.com and click Sign Up. Make certain that you select the "I agree this is for non-commercial use only" box. I have checked with Box and have been assured that a single user, even if they are a PA, can use the Personal Account without an issue.

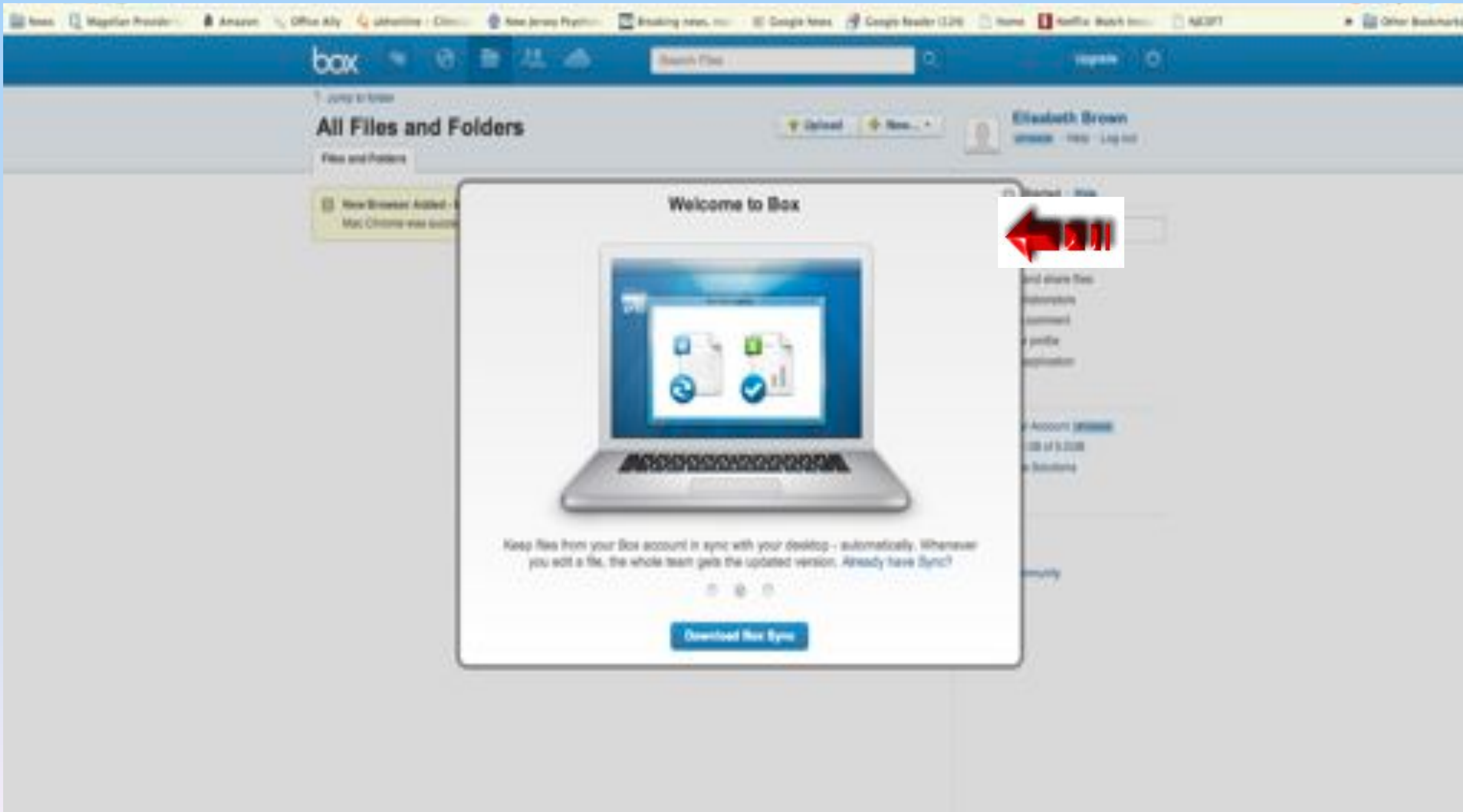
Implementing a Cloud Solution

2. Once your email has been verified. You will be taken to the screen below where you can click on the “Log in and Get Started” button.

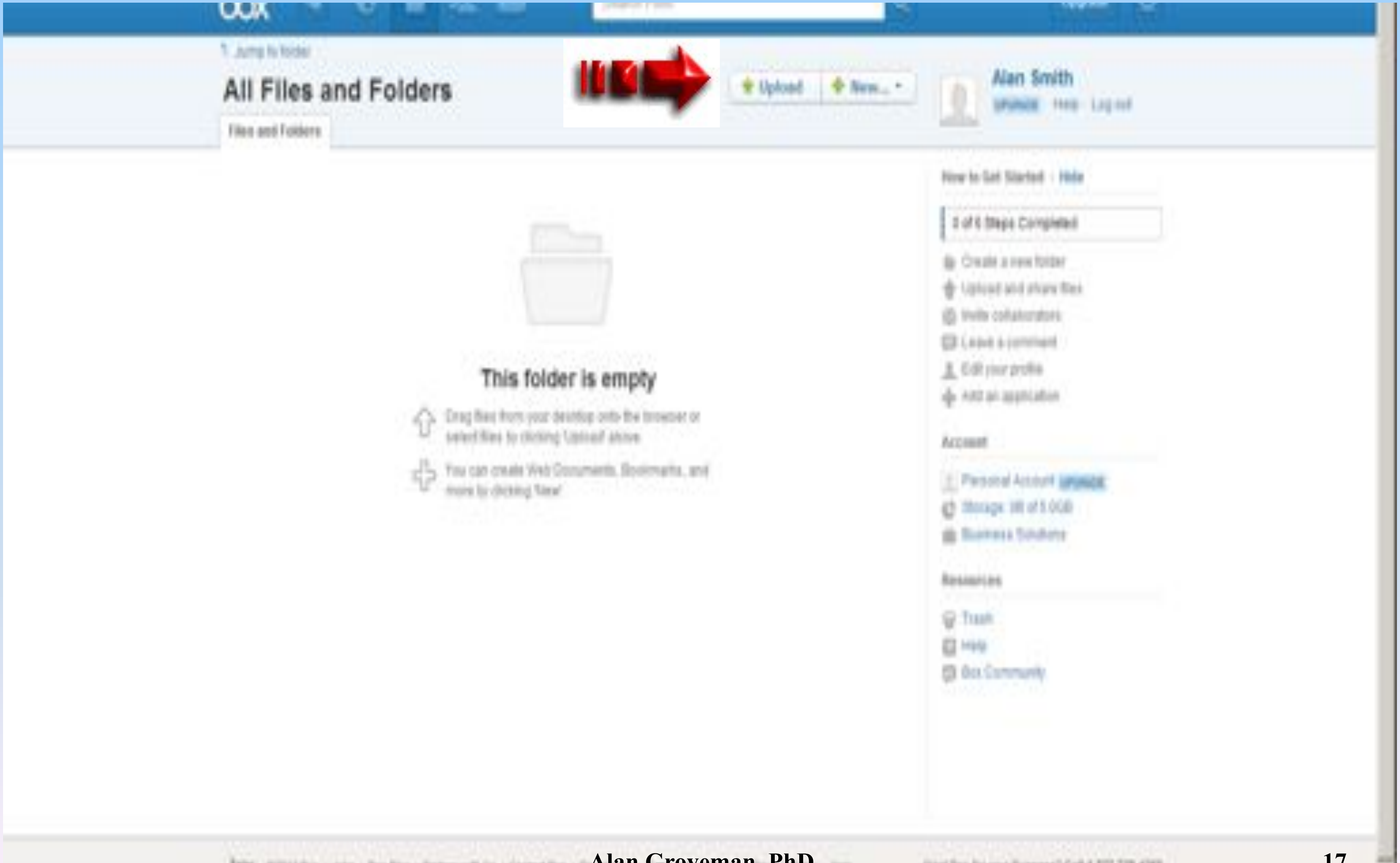


Implementing a Cloud Solution

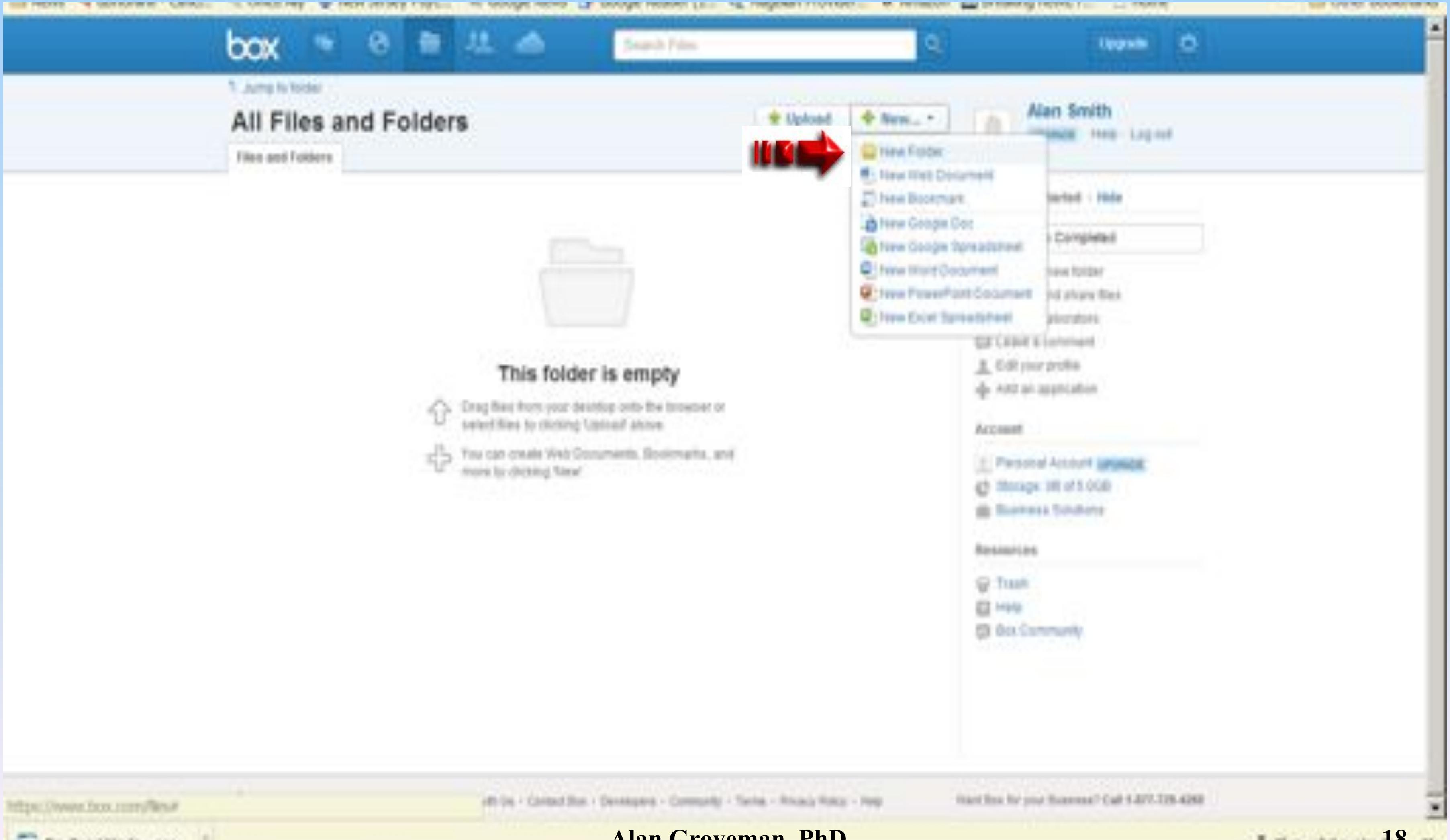
3. After clicking continue you will be presented with the screen below. Click on the close button



Implementing a Cloud Solution
4. The All Files and Folders screen with upload and New buttons is presented

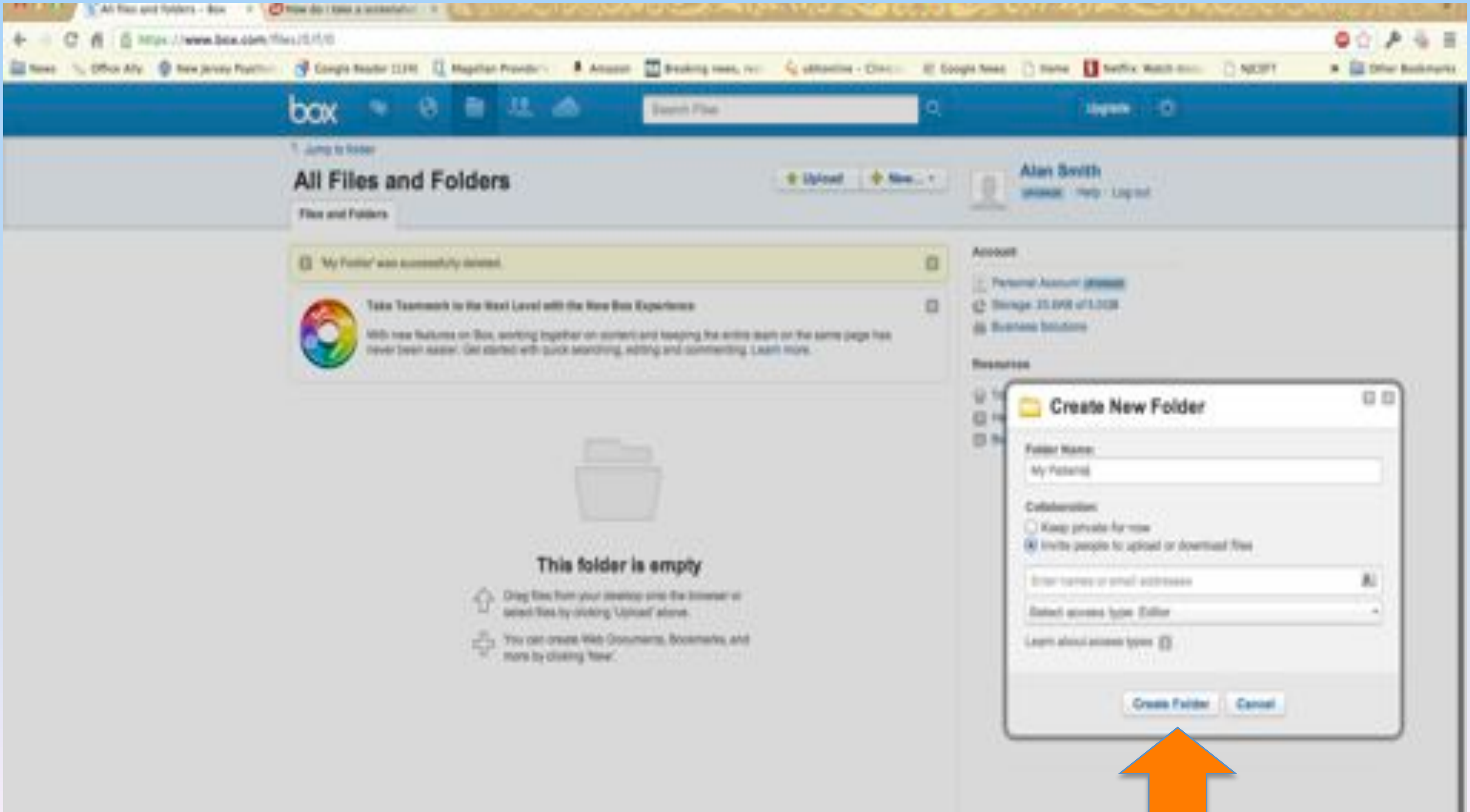


Implementing a Cloud Solution
5. Folder icon



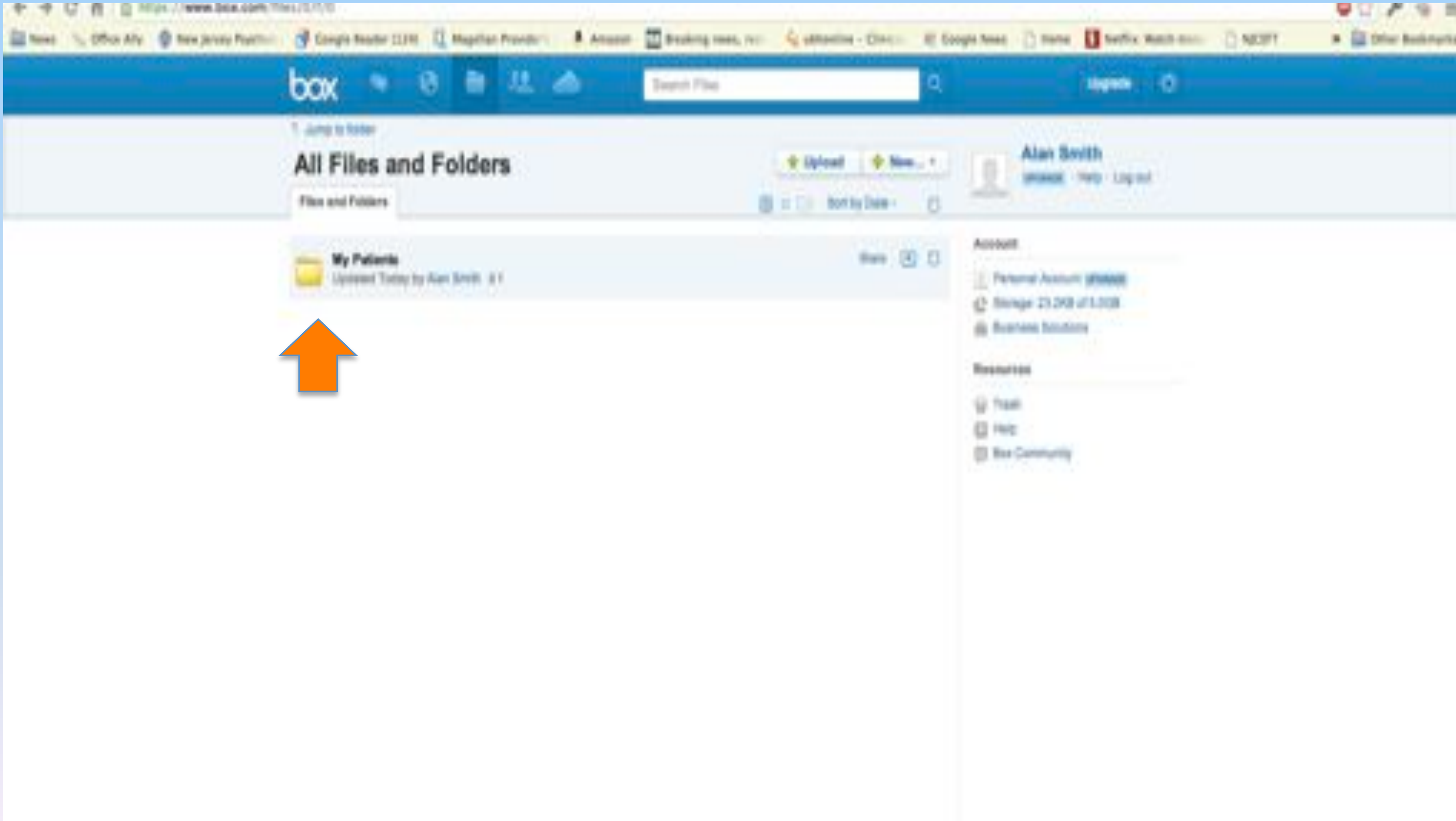
Implementing a Cloud Solution

6. Type in the name you want for your new folder and click the Create Folder button



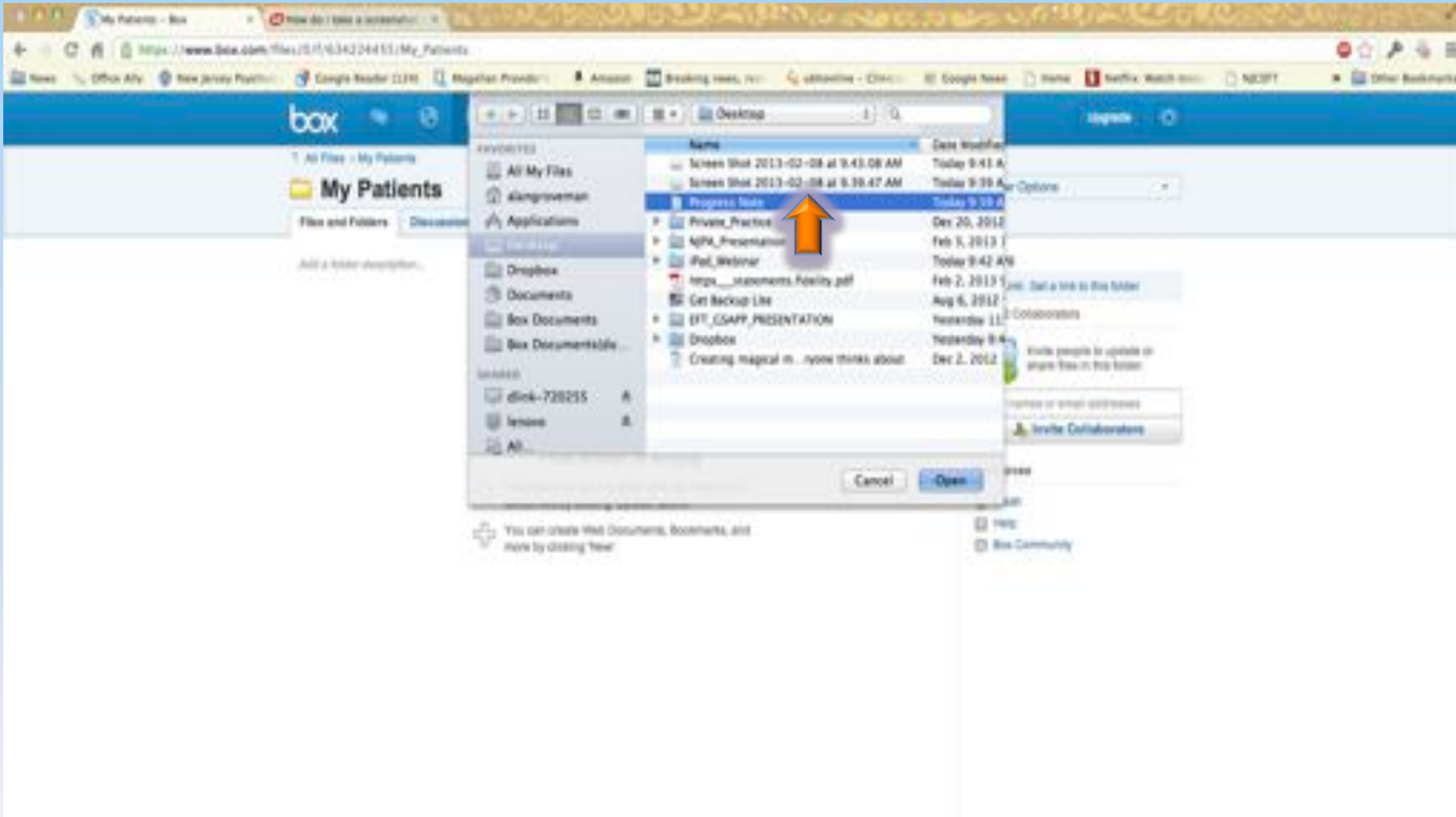
Implementing a Cloud Solution

7. The folder that you created will appear on the screen

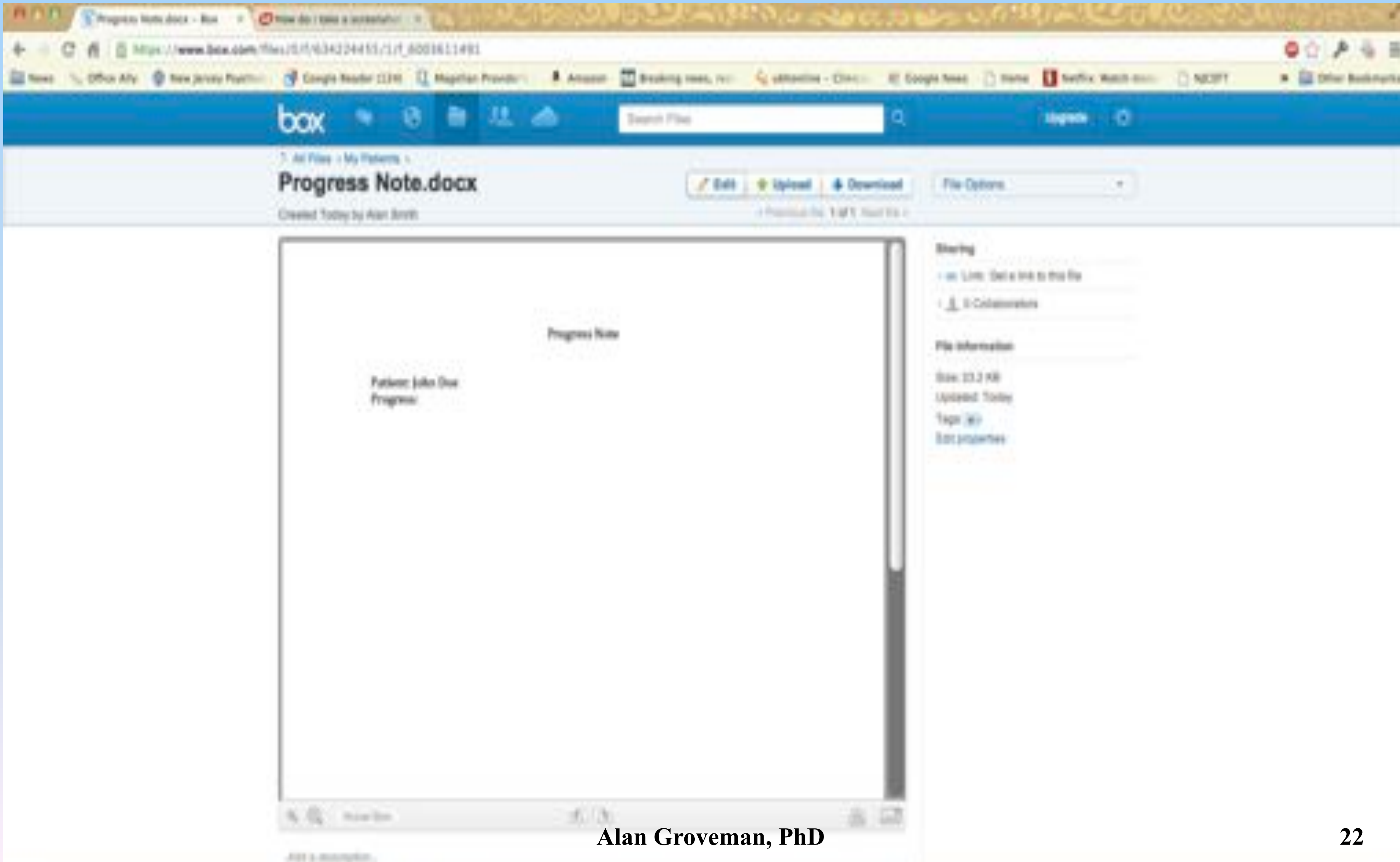


Implementing a Cloud Solution

8. Next, scroll to the specific file you want to upload and double click on that file.

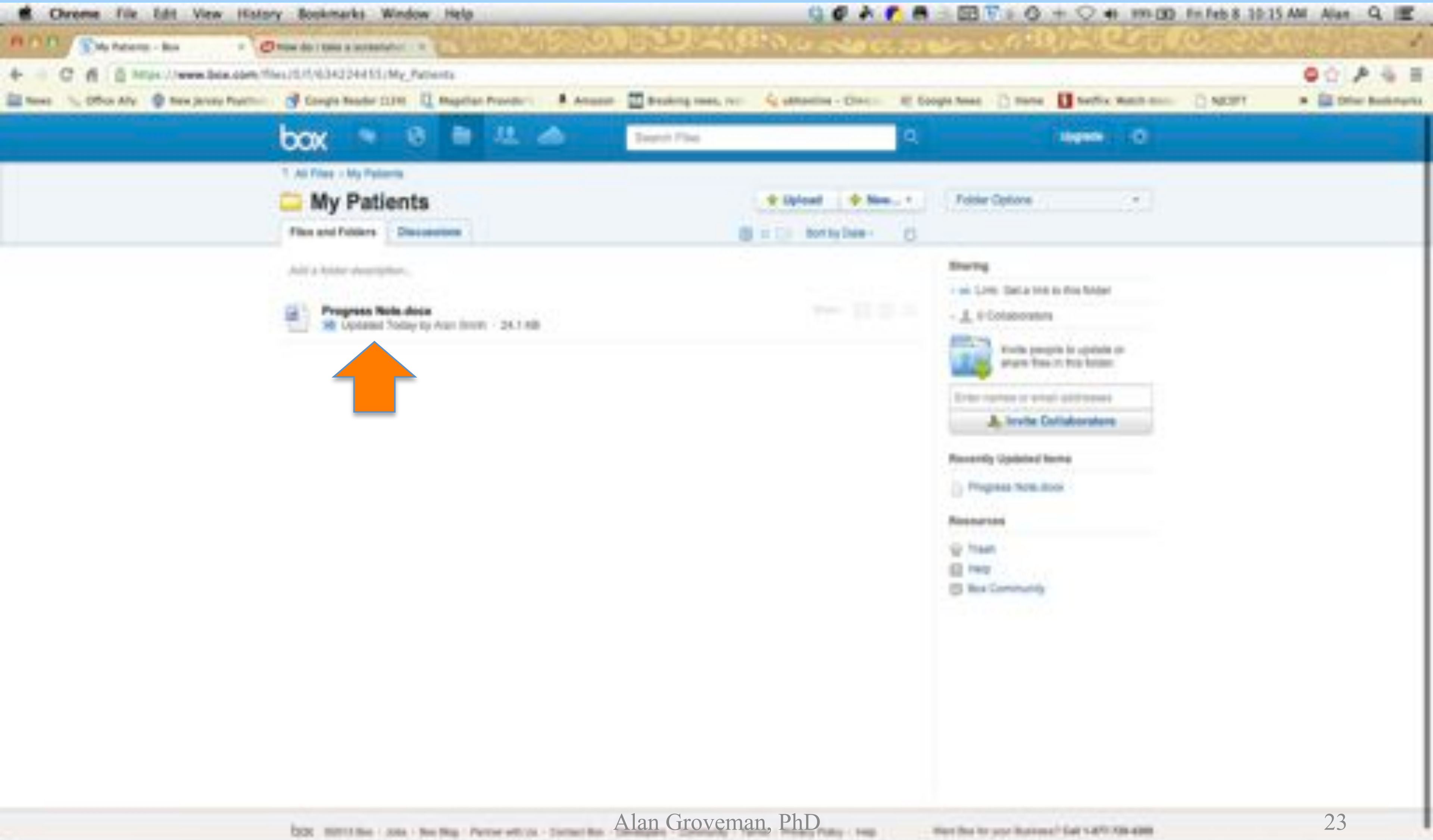


Implementing a Cloud Solution
9. You will then see the file you uploaded



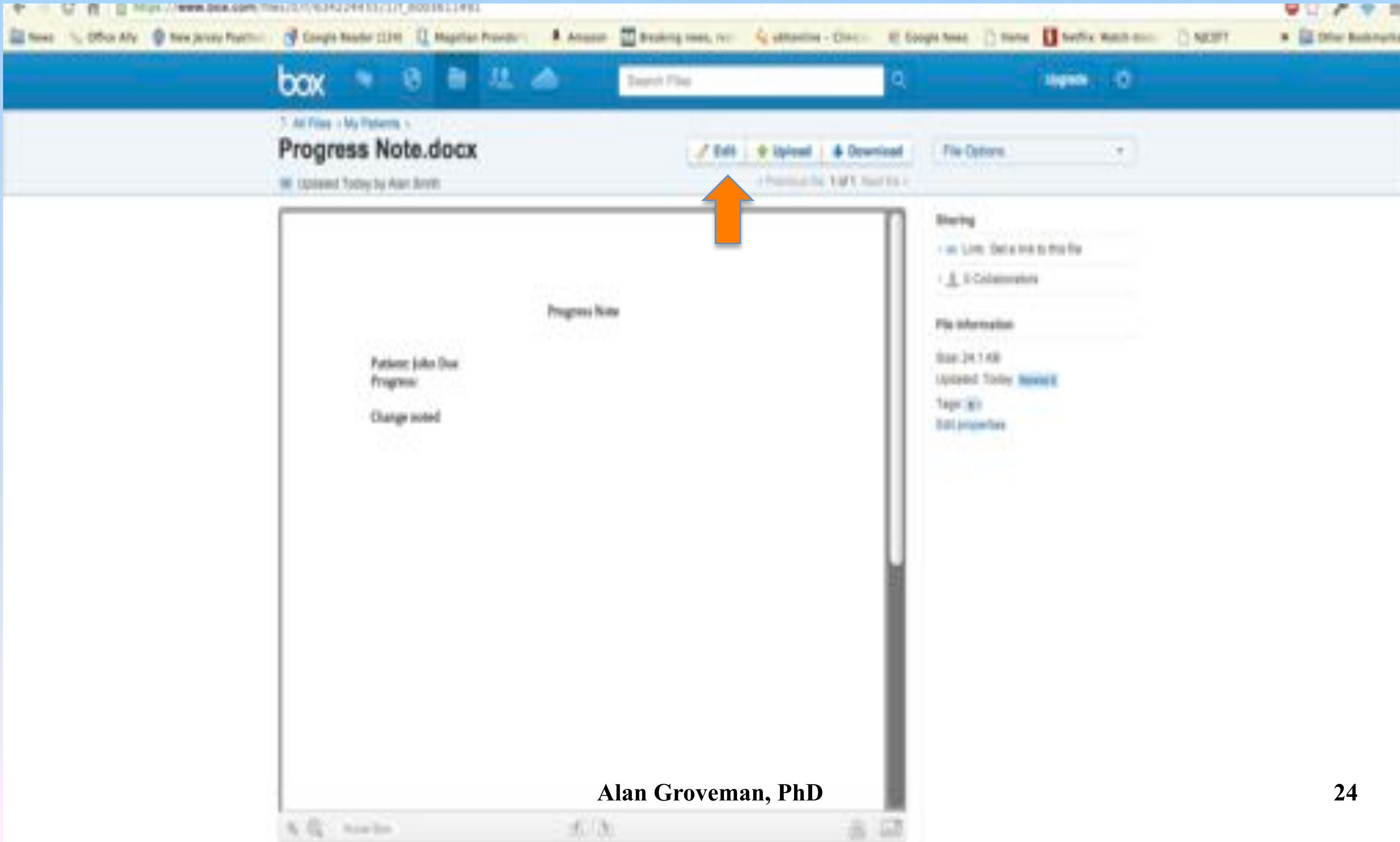
Implementing a Cloud Solution

10. If you uploaded more than one file, you can click the file that you want to edit to open that file.



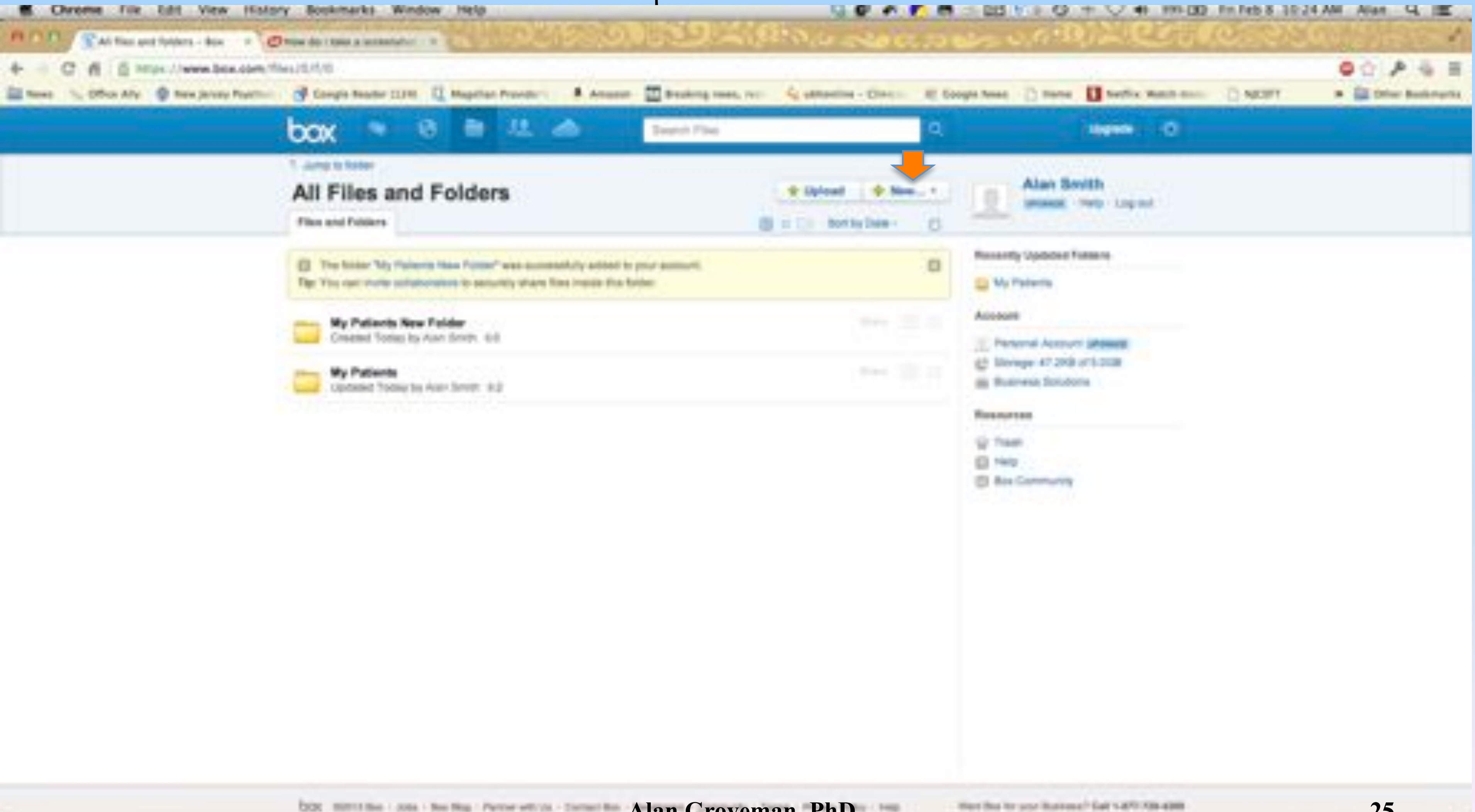
Implementing a Cloud Solution

11. To edit a file click on that file to open it. Clicking Edit for the first time will download an Edit application. Once the application is downloaded your file will be opened in a Word document, or PDF, etc. You can make changes and selecting Save from the documents navigation bar will save your edited file to your Box Account

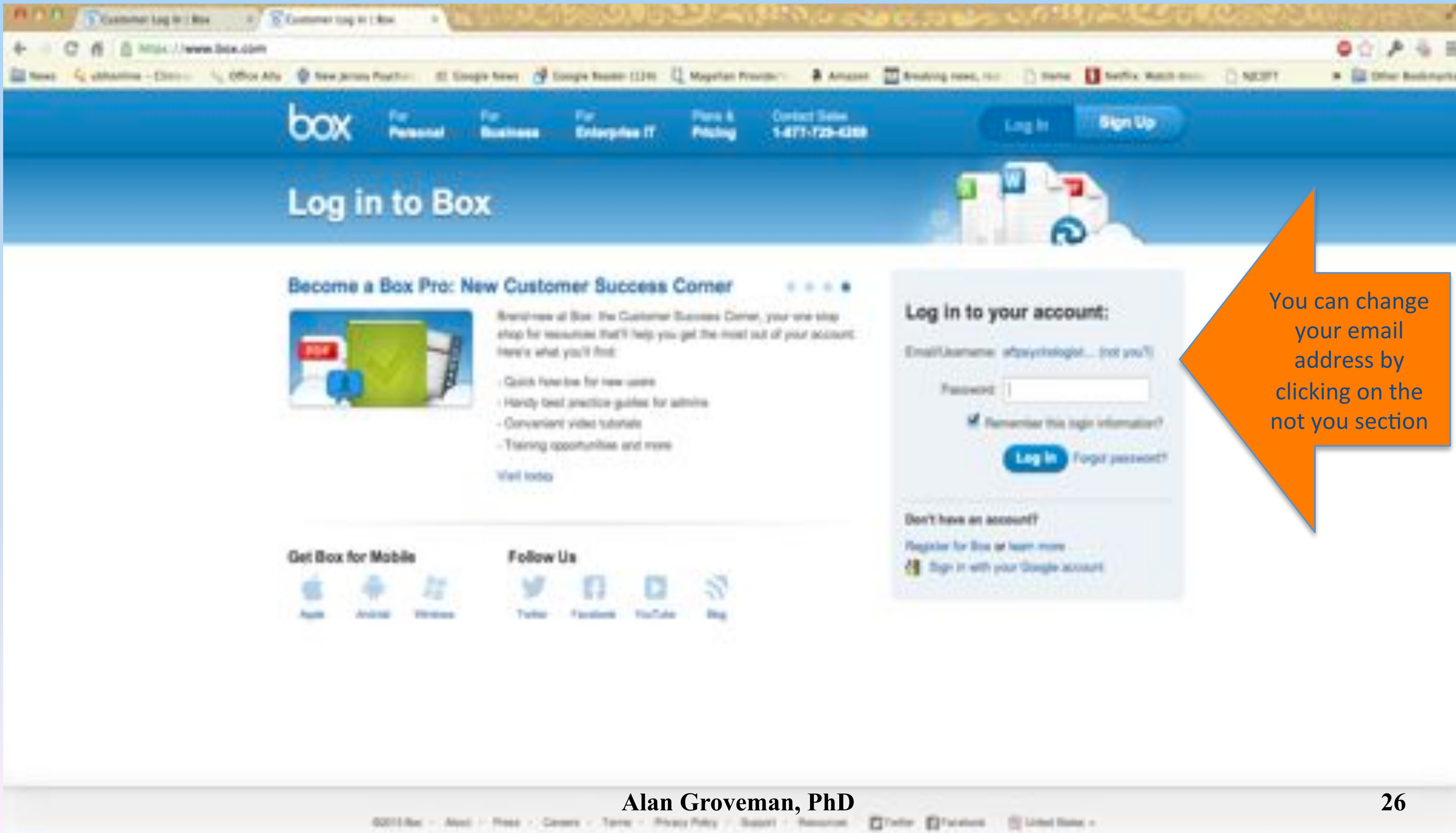


Implementing a Cloud Solution

12. NOTE: you can upload as many files as you like into the folder you created. Of course, you can also create a separate folder for each patient – Just click the New button, click on the New Folder button and name your new folder. and upload their files to that folder



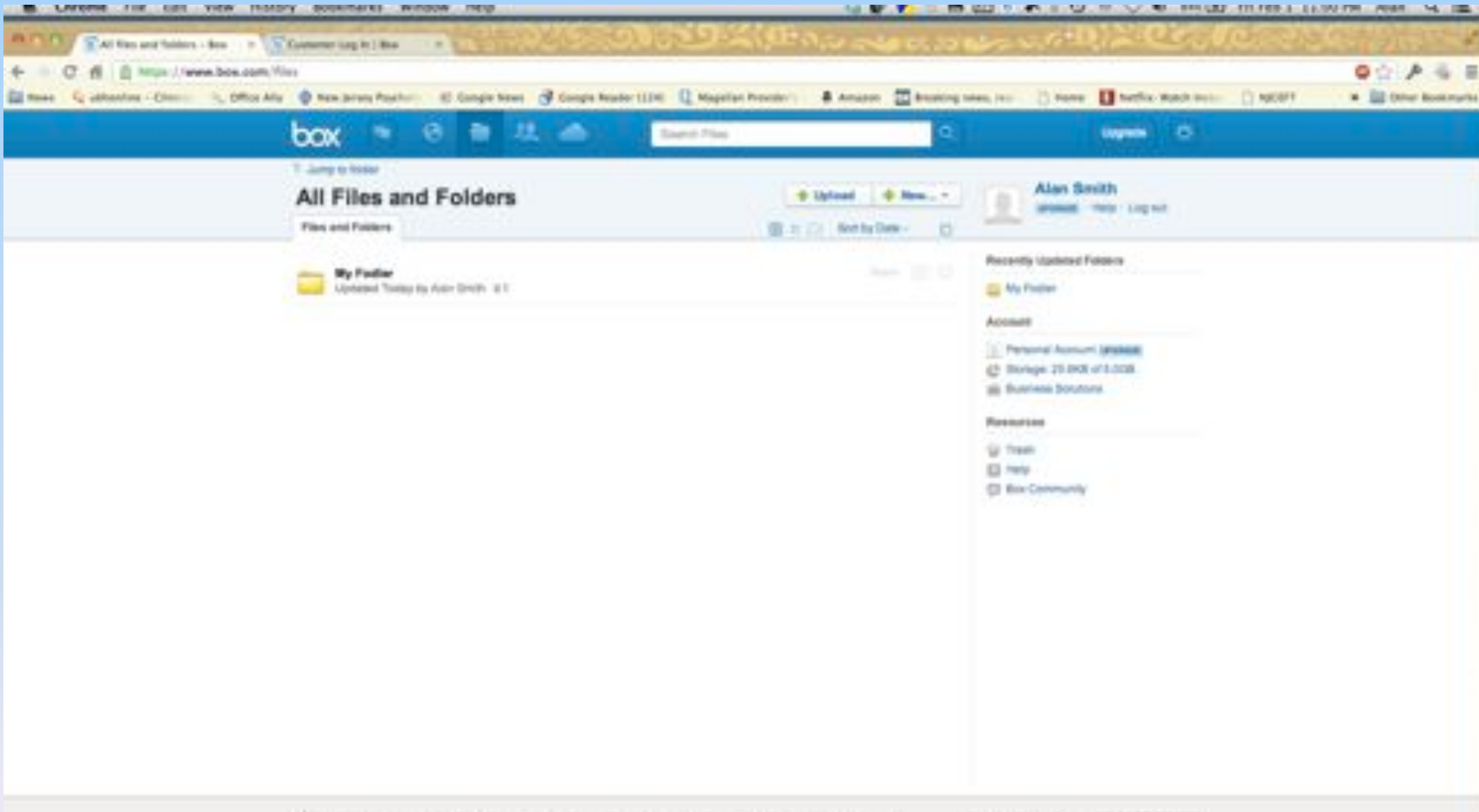
13. Now, from any computer you can go to http://www.box.com and select the Log in button to access this screen, or this screen will appear when you type in the address above. Then type in your email, if you need to, or change the email address to match your Box account, followed by your password and the Log in button



You can change your email address by clicking on the not you section

Implementing a Cloud Solution

14. You can now create a New Folder, upload, and/or edit any of the files in your folder NOTE: the Edit button does not have to be selected, editing will be launched automatically

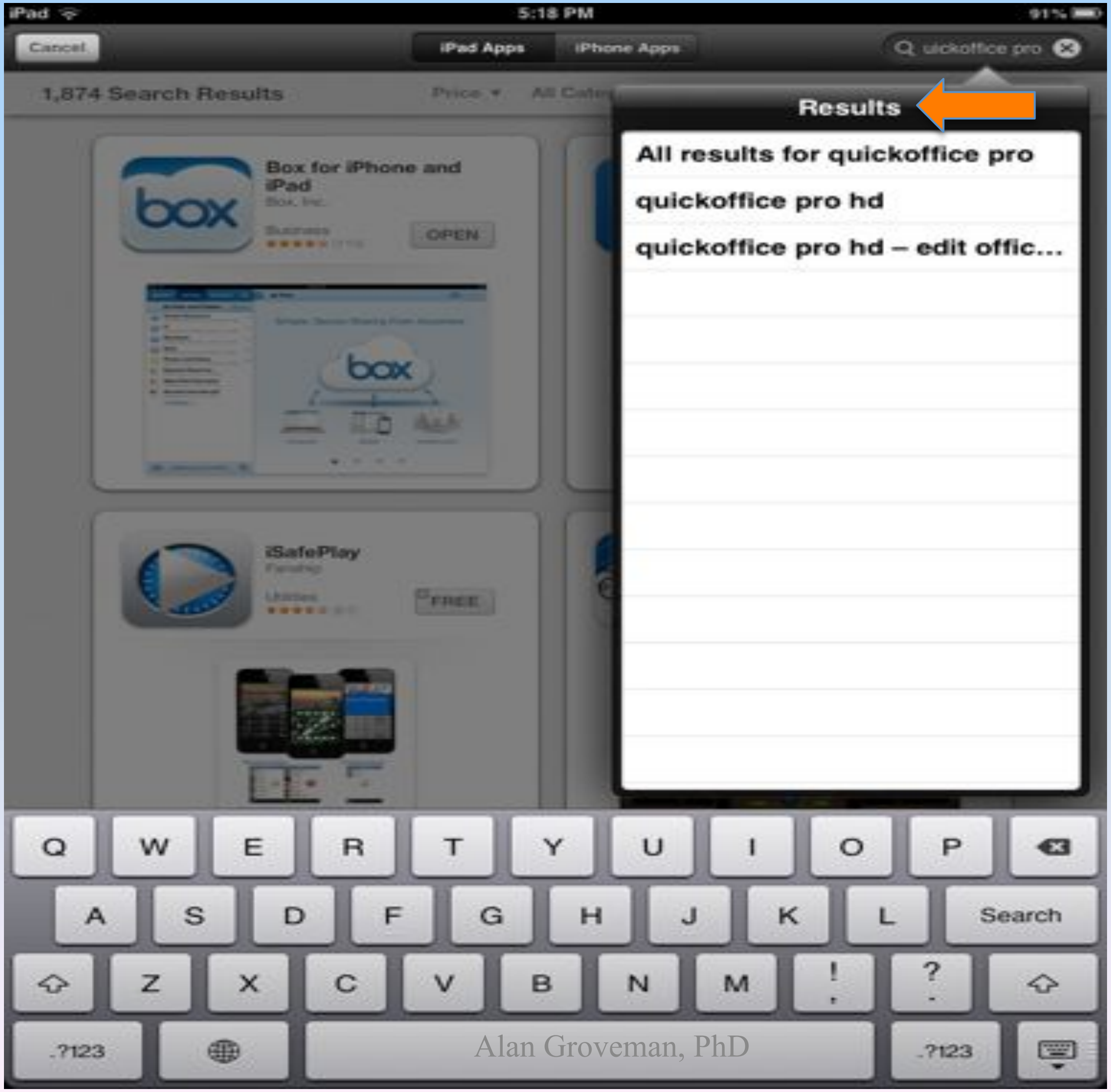


Implementing iPad Applications

1. On your iPad click on the App Store app and search for box and click on box.com and install the free Box application

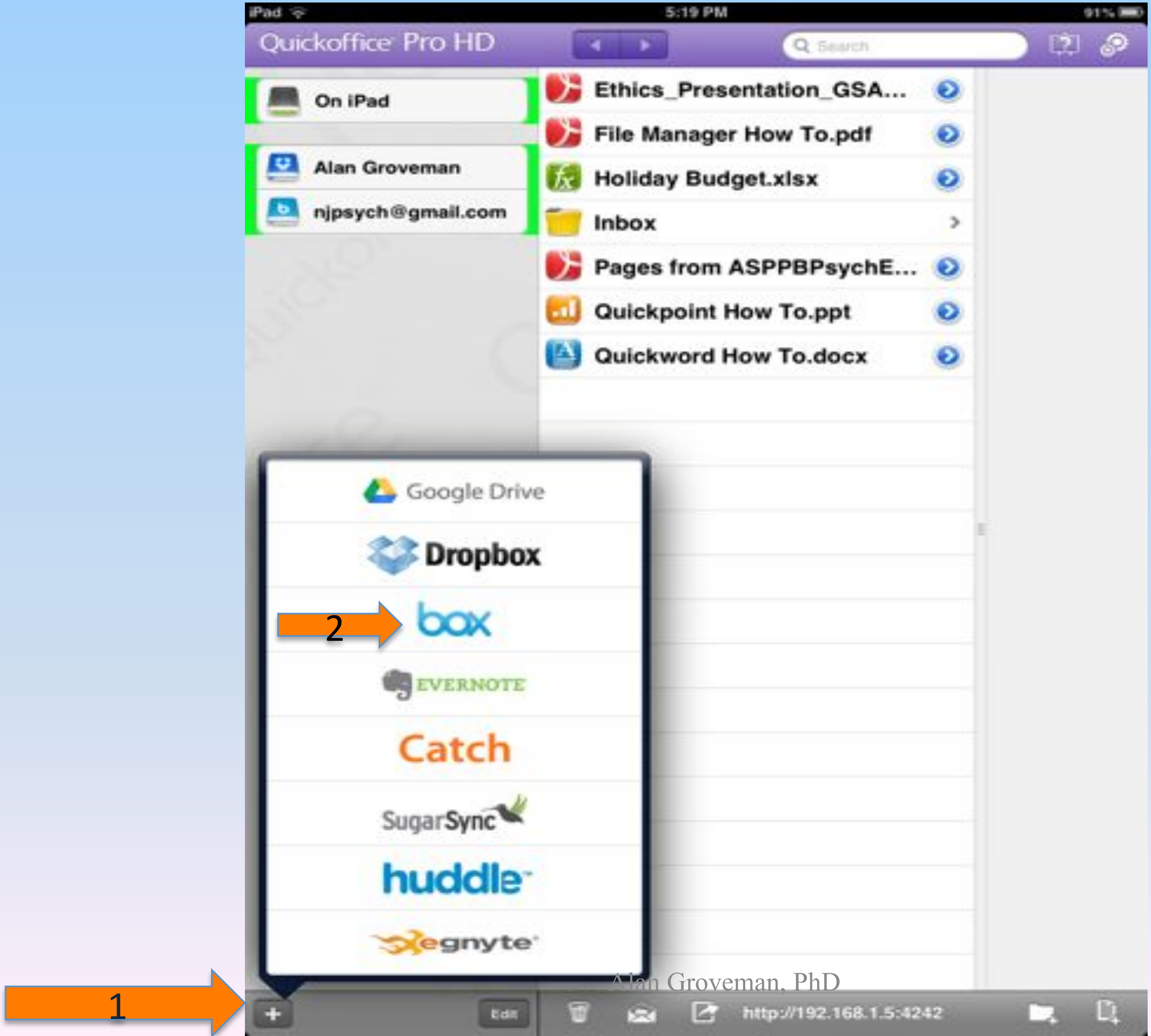
Implementing iPad Applications

2. Next return to the App Store and search for quickoffice pro hd and click on that selection and install the quickoffoffice pro hd application ($19.95)

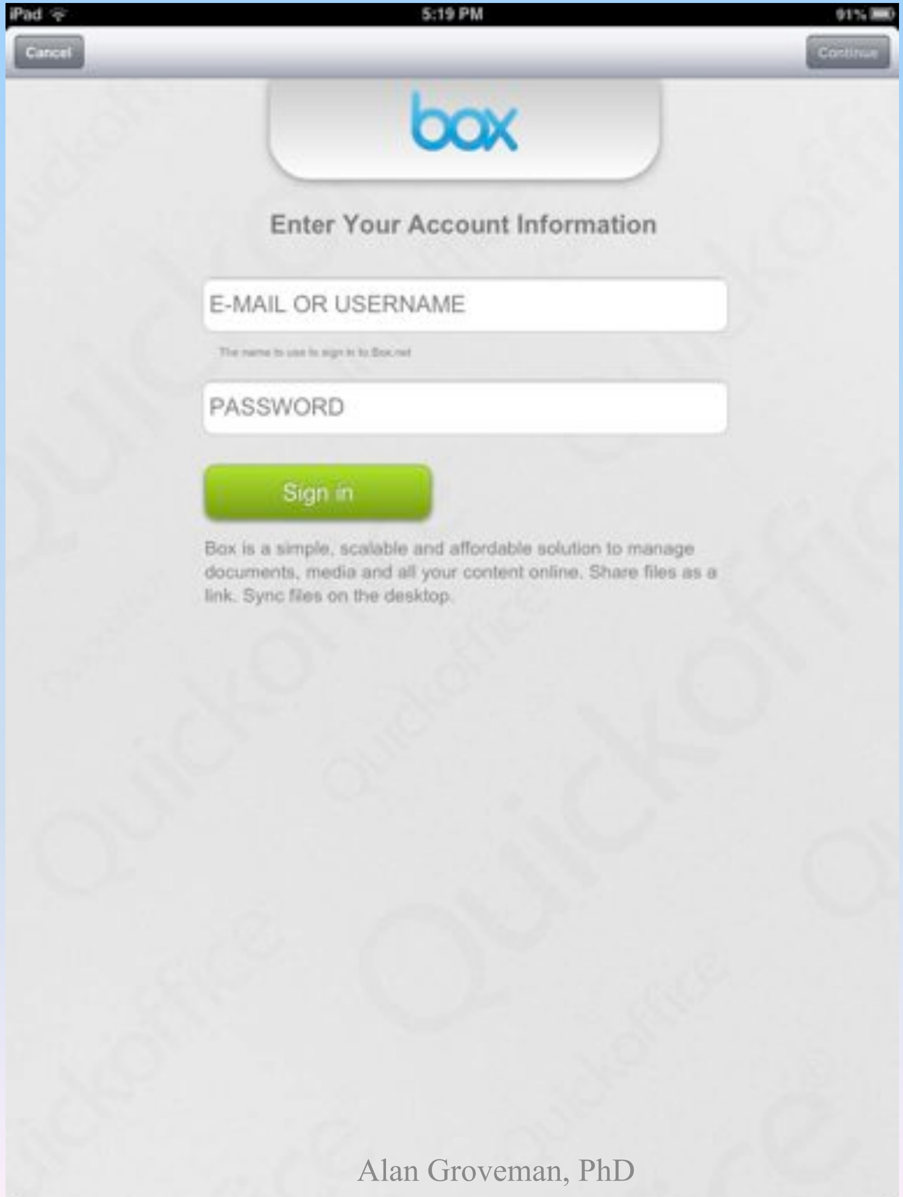


Implementing iPad Applications

3. Once Quickoffice pro HD is downloaded open the application and click on the + button (1) and then click on the Box icon (2)

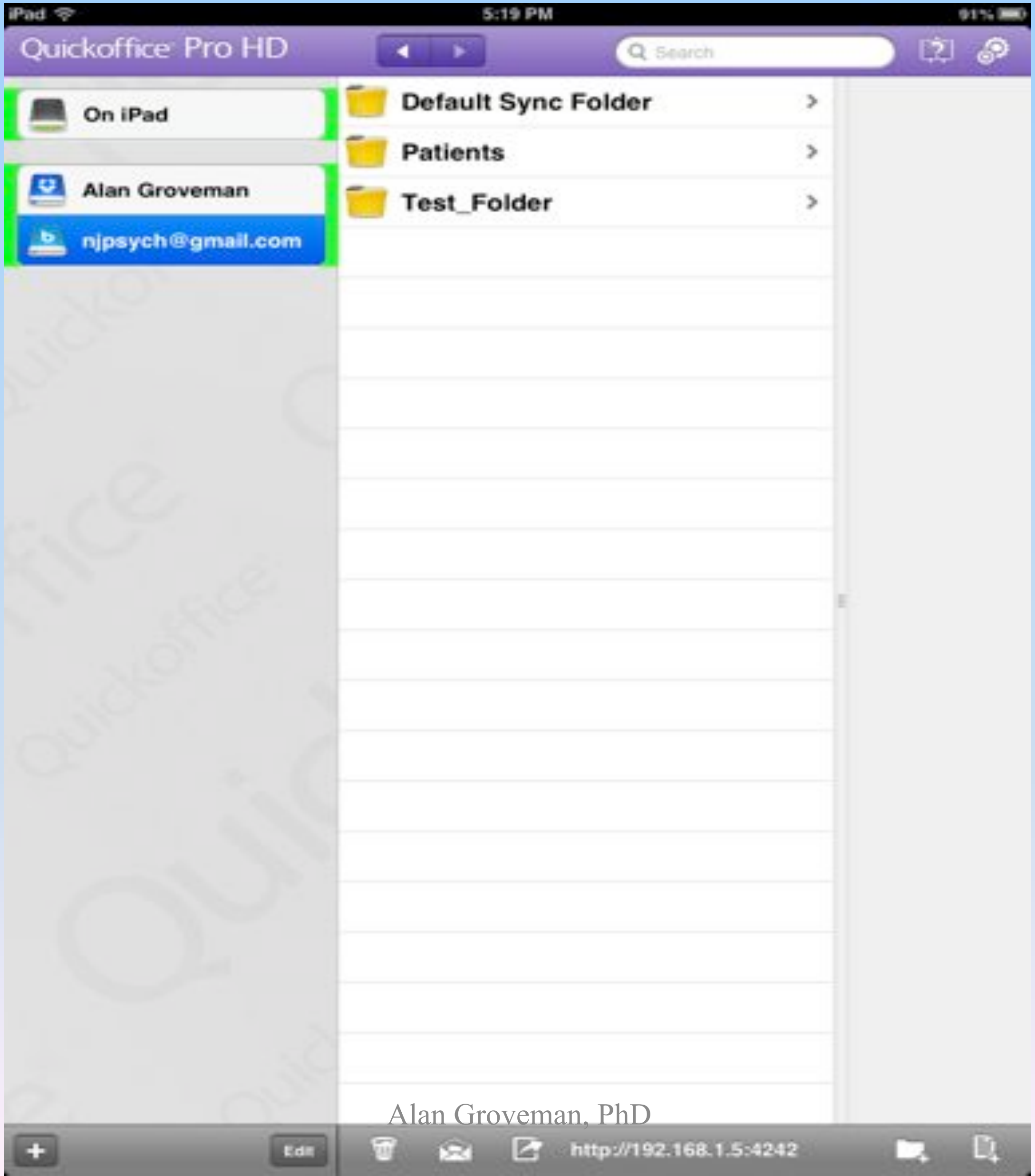


4. The Box screen will appear. Type in your Box Account email and password and then click on the Sign in button



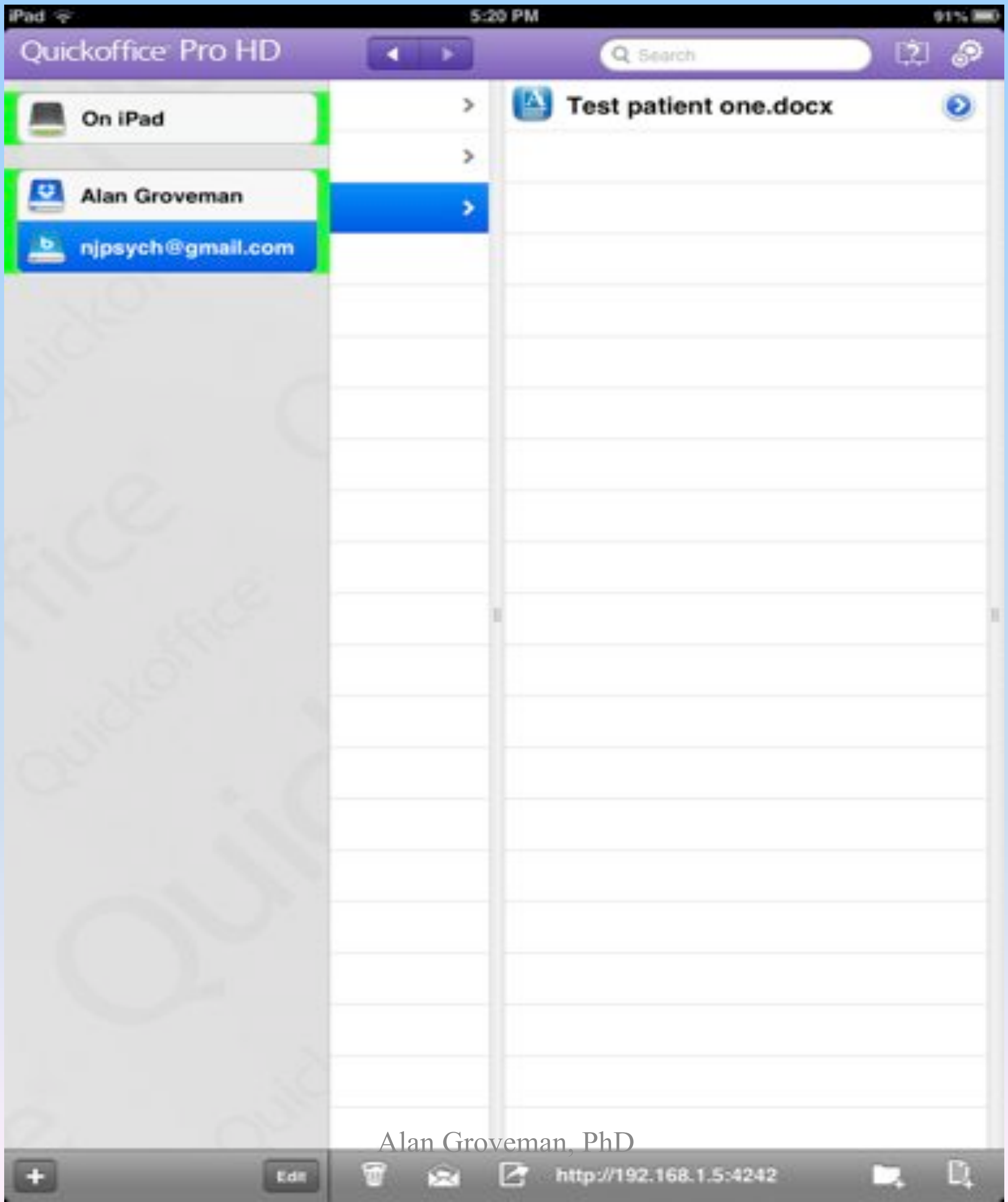
Implementing iPad Applications

5. Your Box Account email will be highlighted and the folders you created will be displayed



Implementing iPad Applications

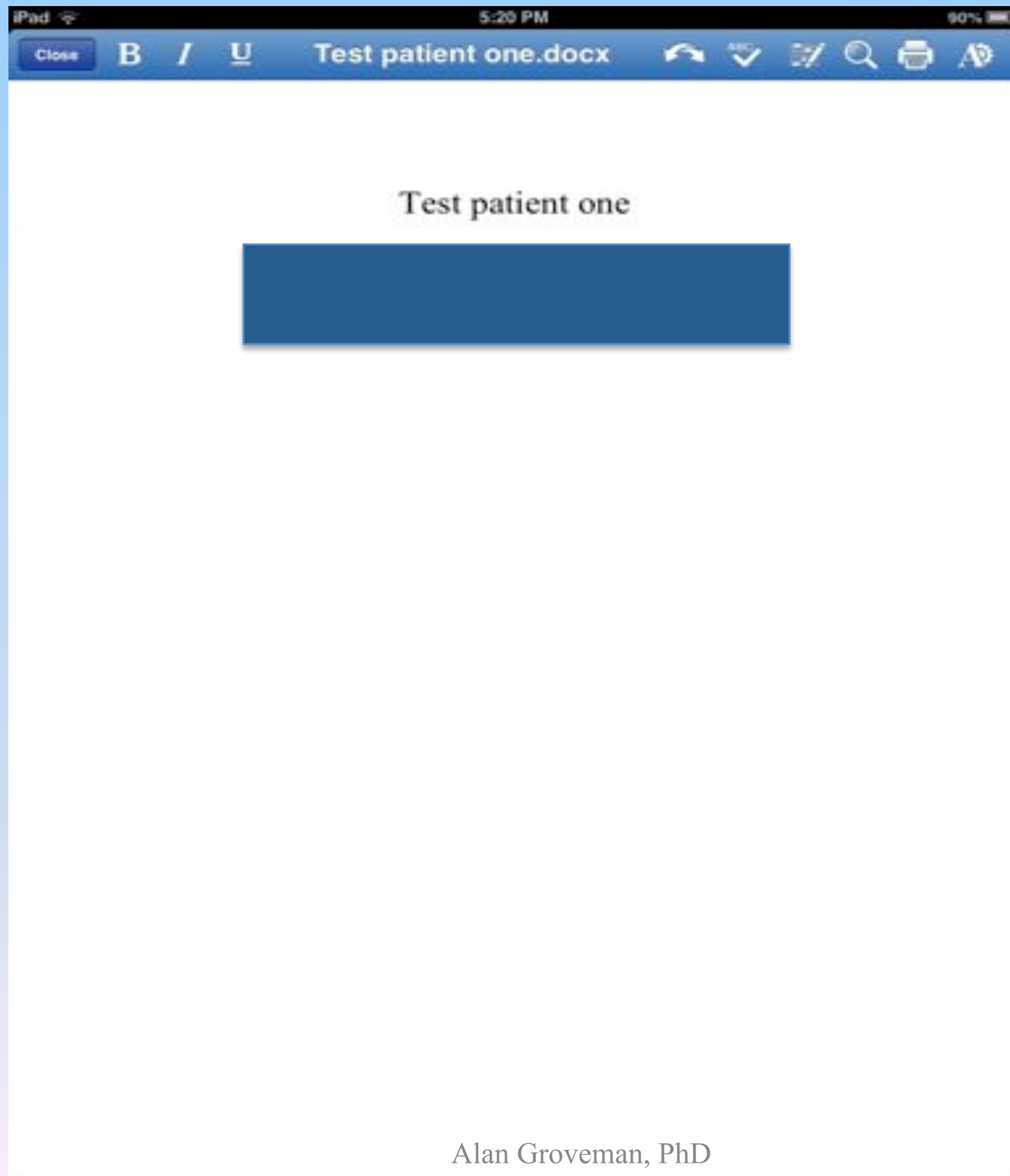
6. Click on a specific folder and then click on the file you want to edit



Click on the file you want to edit

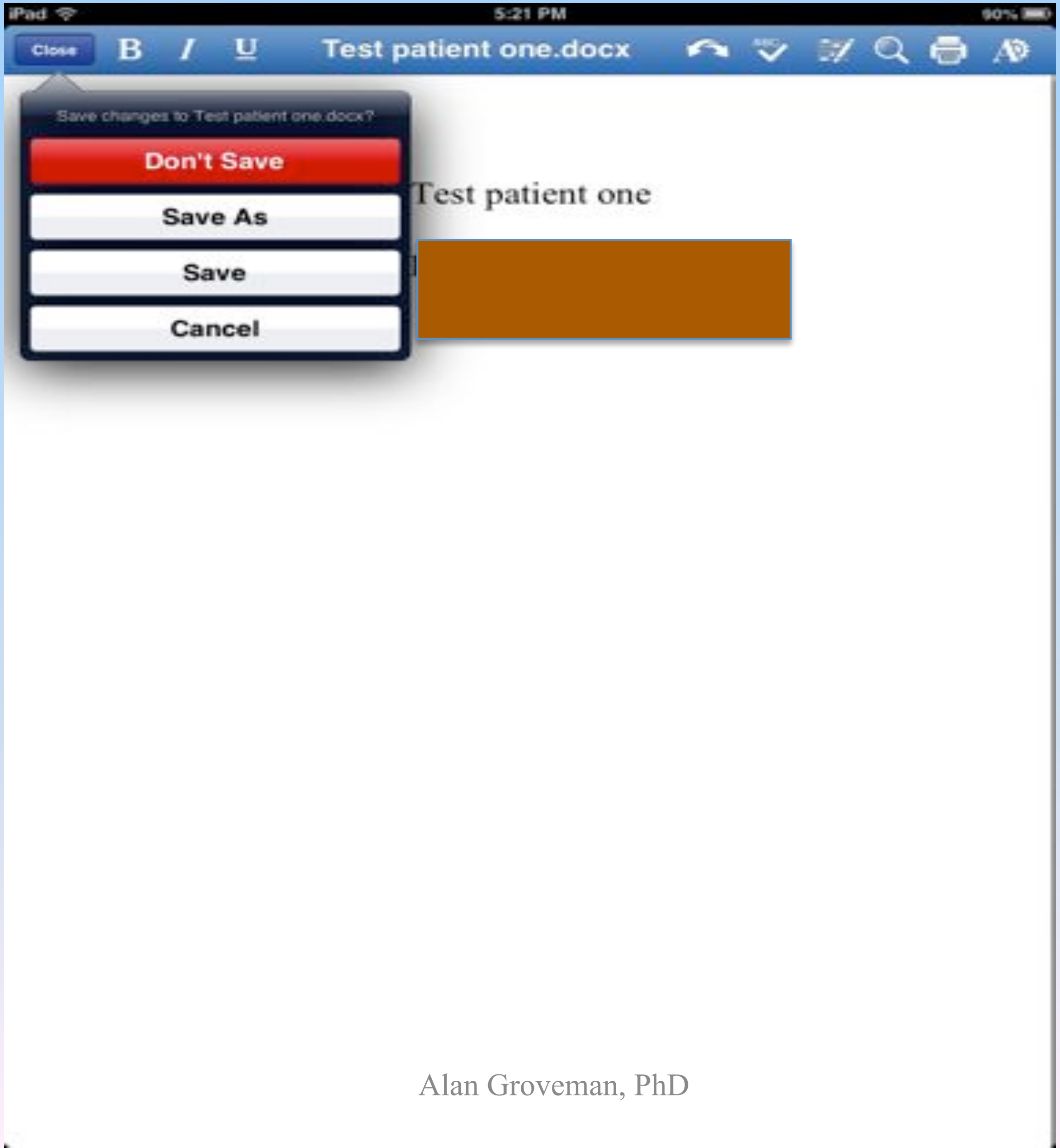
Implementing iPad Applications

7. Make any changes to the file that you want



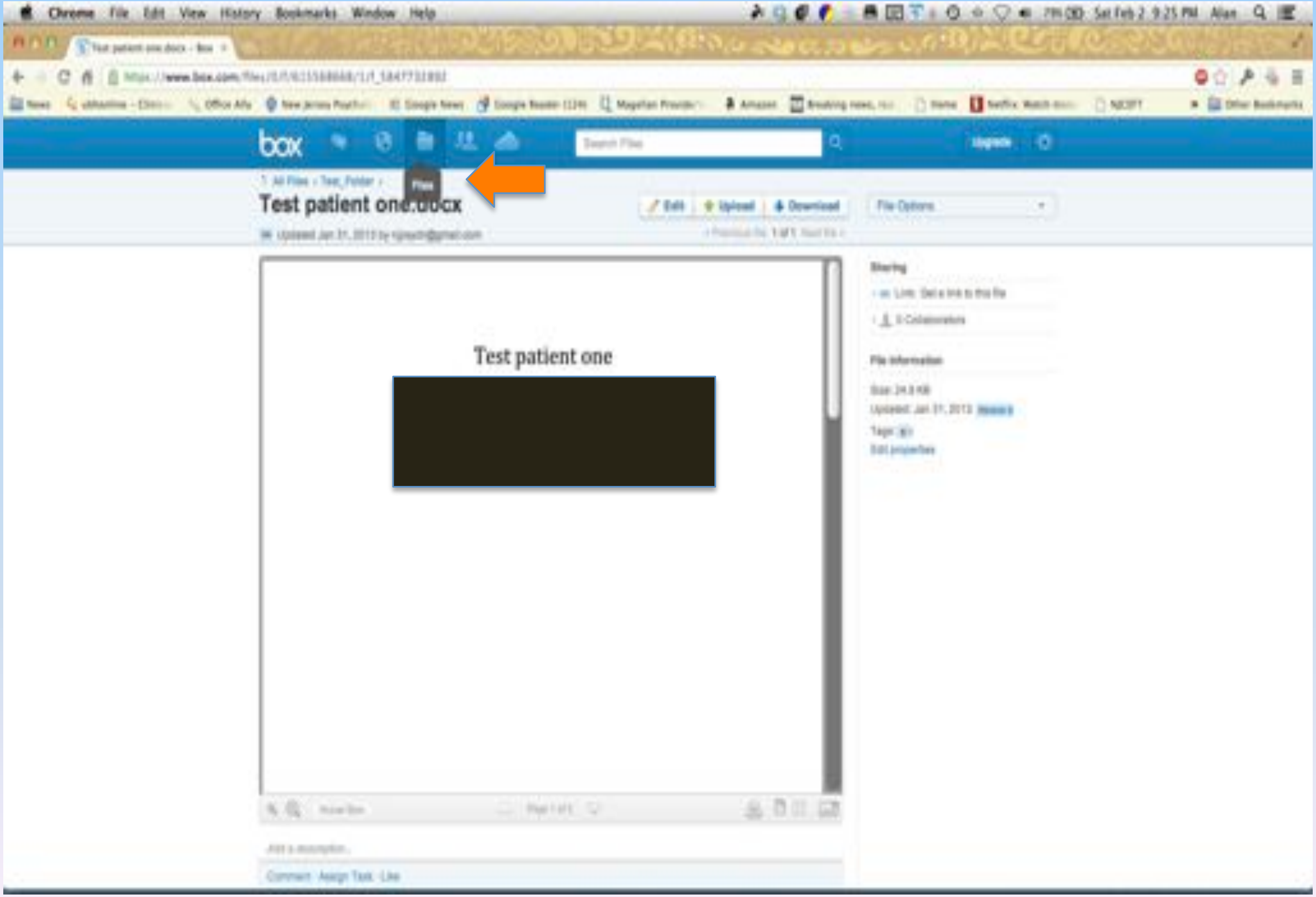
Implementing iPad Applications

8. Click on the close button and from the drop down menu select save. Your file, with the changes is now saved to the cloud and can be accessed by going to Box.com, logging in and clicking the folder icon



Implementing iPad Applications

9. After going to Box.com, signing in and accessing your Box Account click on the Folder icon and select a file. You can see the changes that were made on your iPad that are now synced to your Box Account



Office Ally Implementation

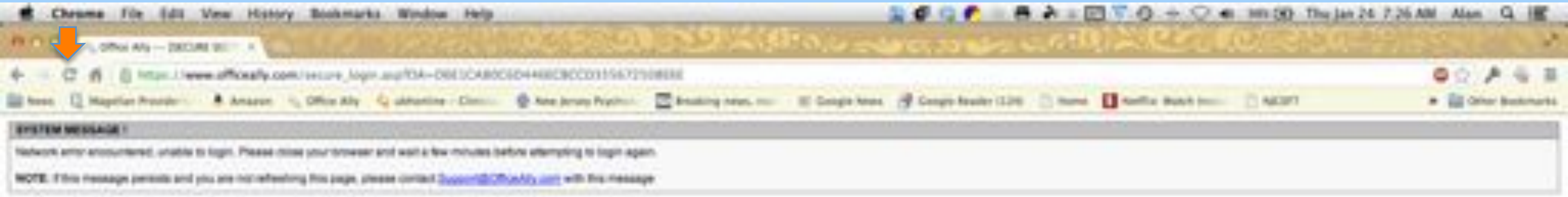
1. Go to www.officeally.com and click on the Enroll Now button.

Office Ally Implementation

2. After filling out the Enroll Now information, click on the LOGIN button (1). enter your User Name and Password and click on the small Log in button (2)

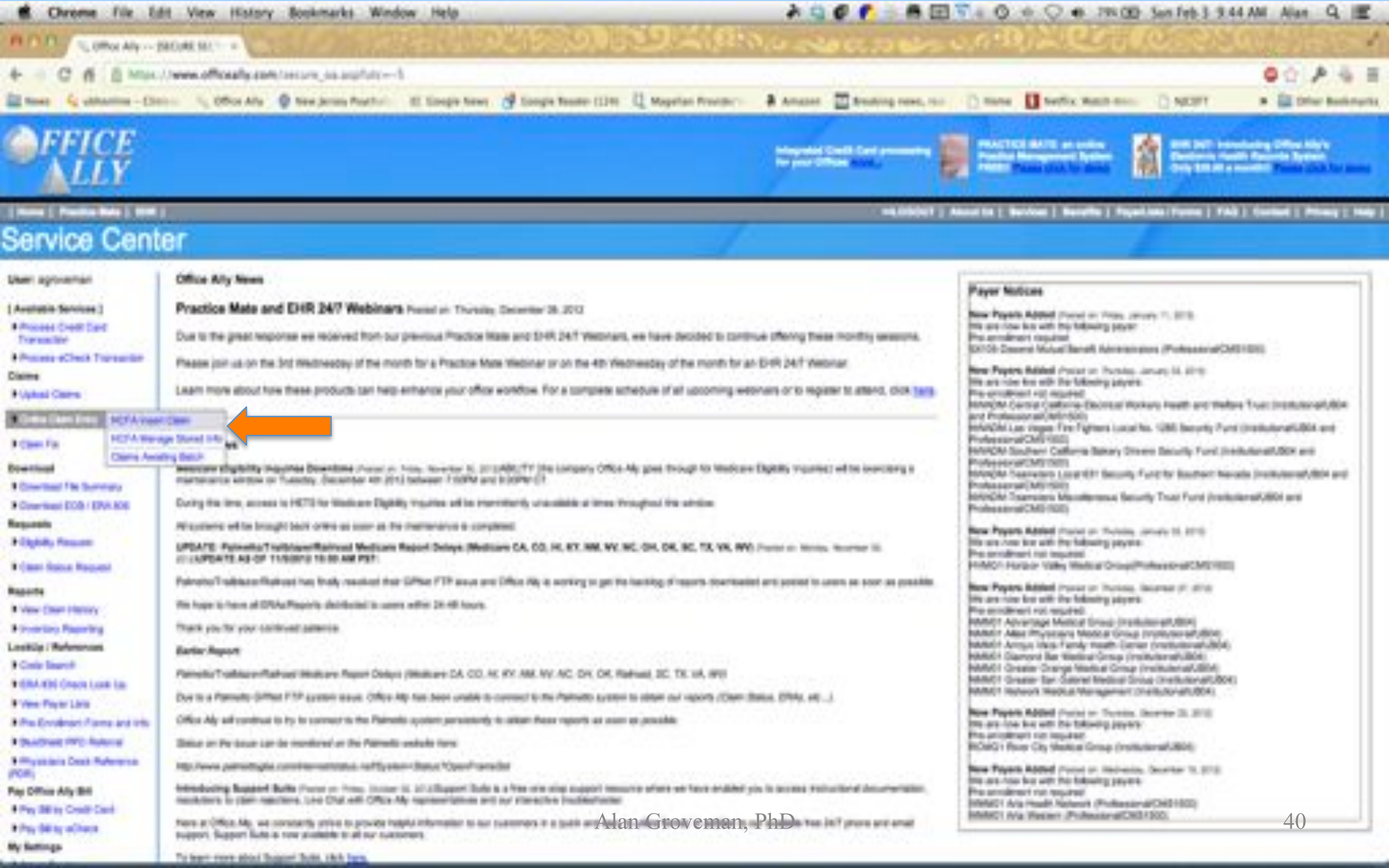
Office Ally Implementation

3. If, for any reason, you see the System Message screen, click on the semi-circular refresh arrow on your web browser to go to the next screen



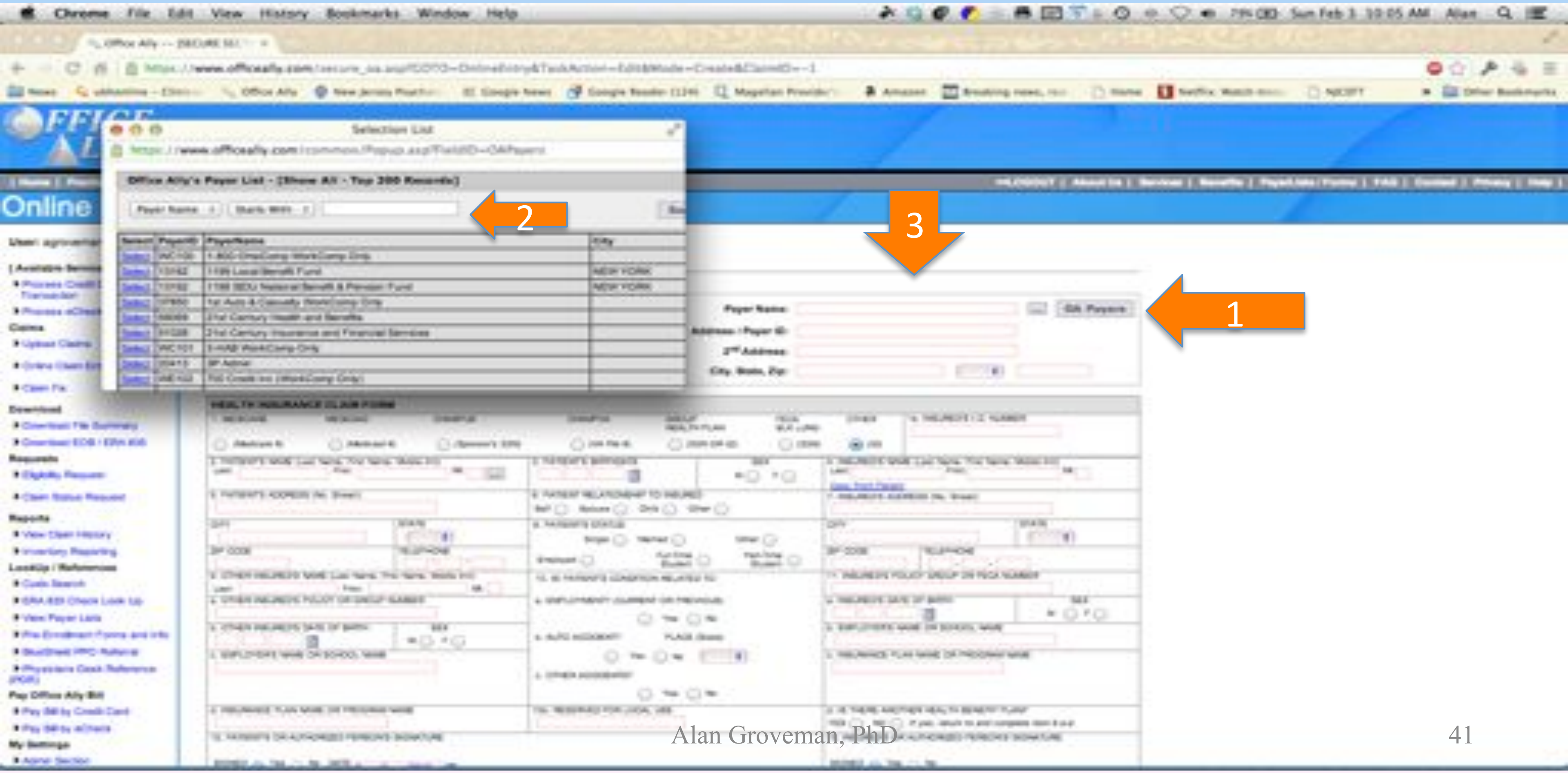
Office Ally Implementation

4. Once you are on the next screen click on the Online Claim Entry drop down menu and select HCFA Insert Claim



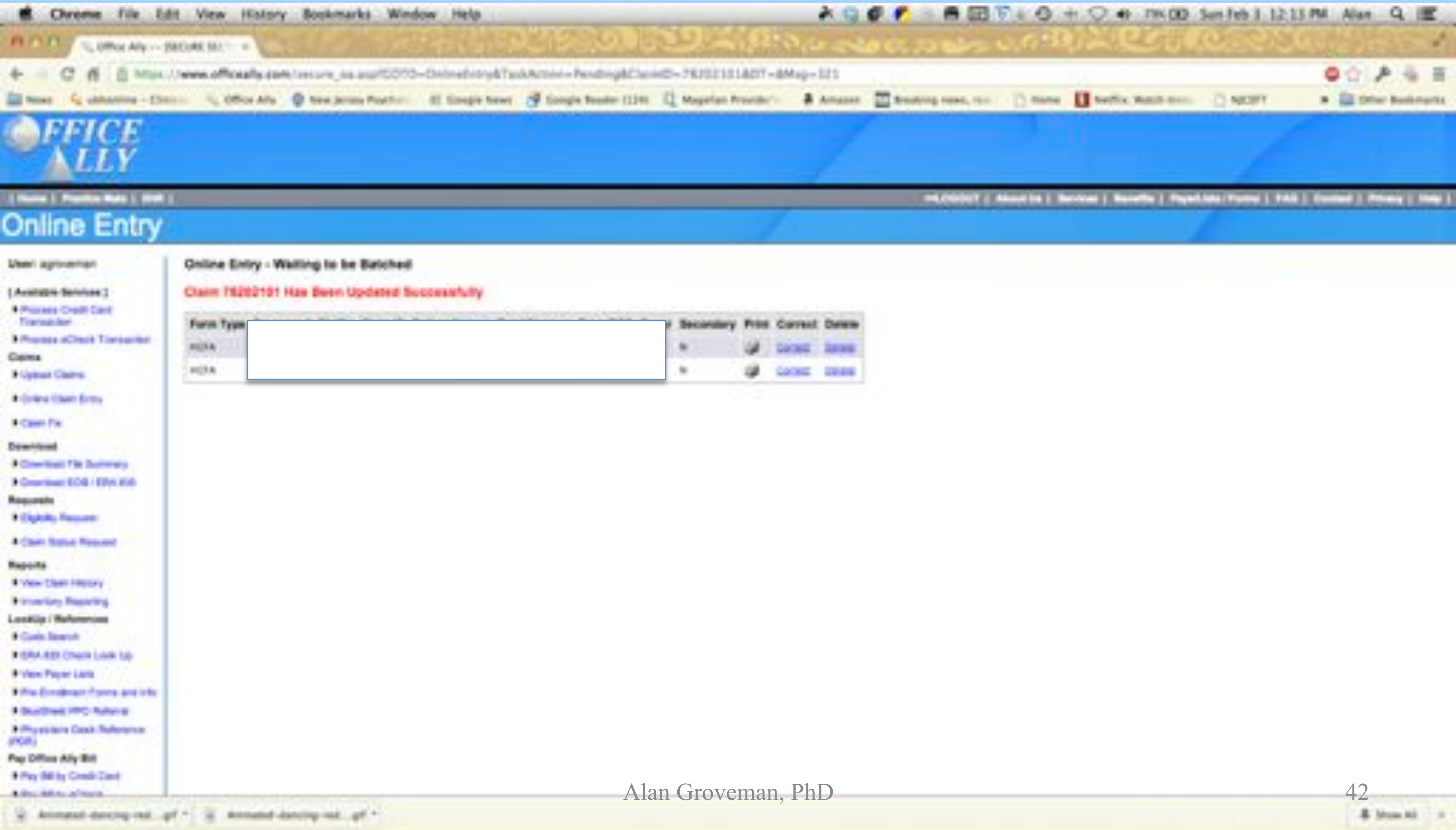
Office Ally Implementation

5. The screen below will appear. Click on the OA Payers button (1) and a Selection List screen will appear. In the blank space next to the Starts with drop down menu (2) type in the name of your patient's insurance co., click the search button on the right and then click on select next to the name of the carrier to choose that specific carrier. This will fully populate the Payer Name section of the HCFA form (3) that is required. Next fill out the HCFA 1500 form with your patient information and click the Update button at the bottom left corner of the screen



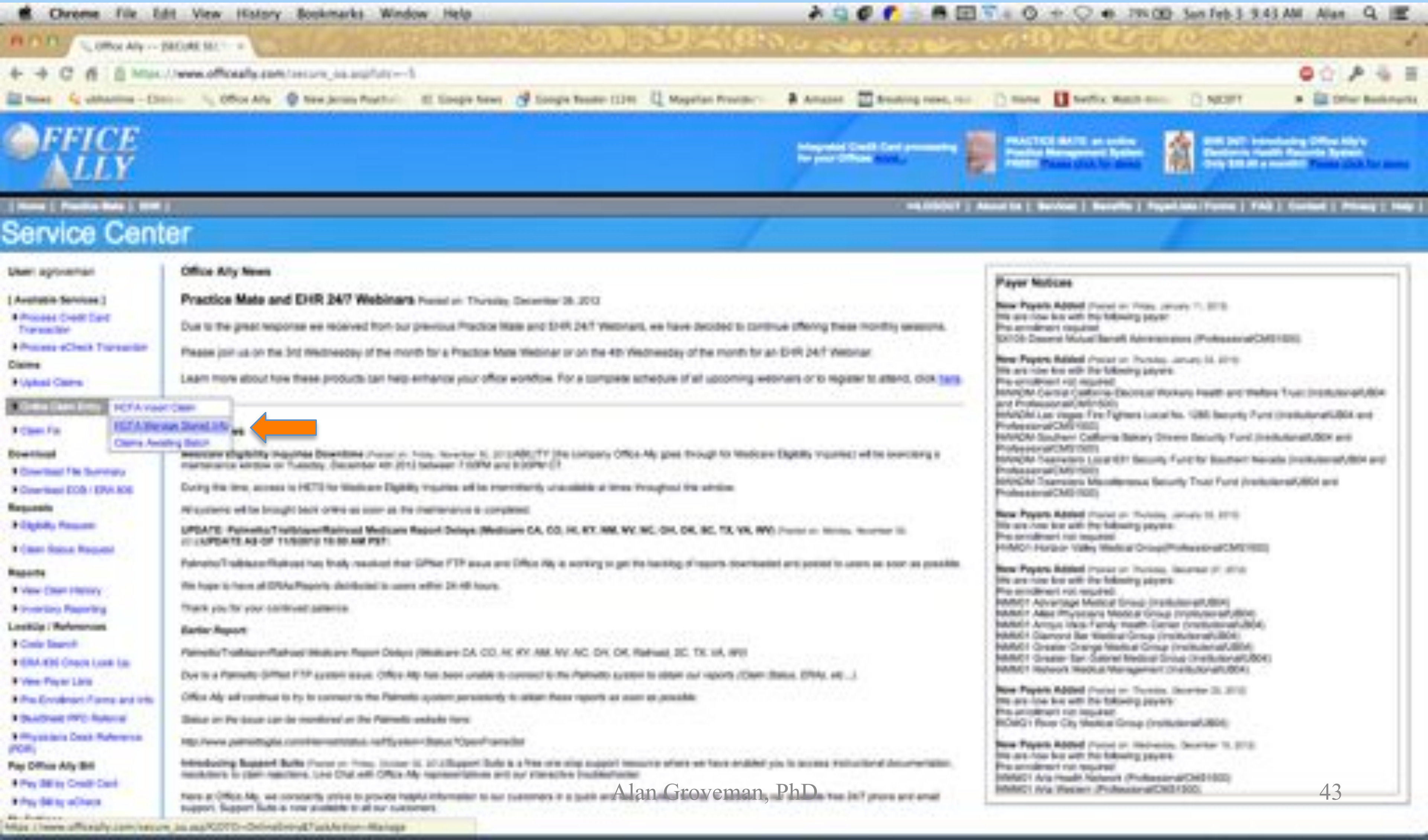
Office Ally Implementation

6. . After you submit a claim, a screen similar to the one below (the patients claim ID, name and DOB, will be shown on your screen), will appear informing you that the claim submission was accepted. You will also receive a confirmation email



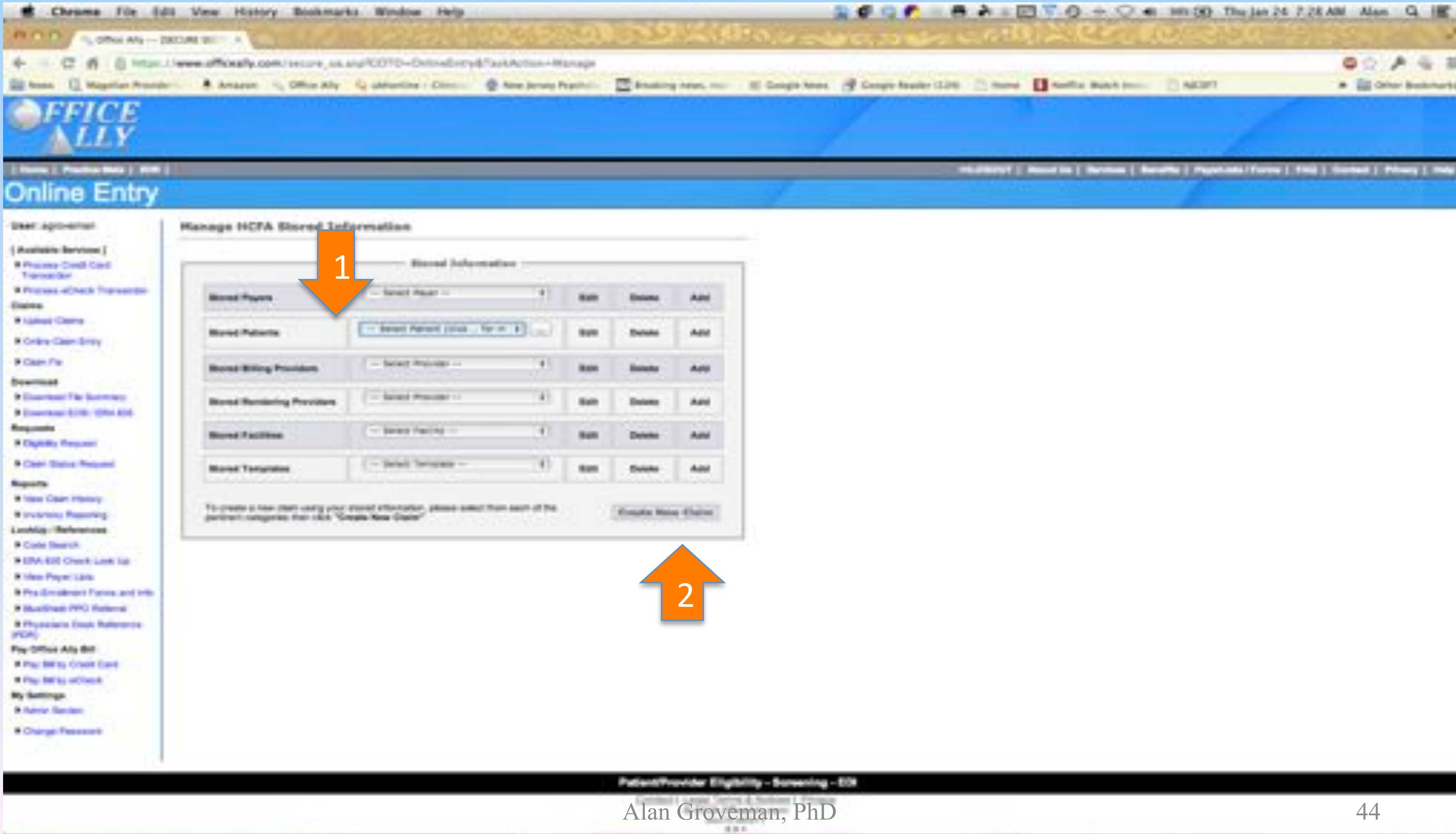
Office Ally Implementation

7. To access a patient's stored information and create a new (after the original) statement to submit, log into Office Ally, and from the Online Claim Entry drop-down menu click on HCFA Manage Stored info.



Office Ally Implementation

8. At the next screen click on the Stored Patients Select Patient (1) drop down menu, select your patient and click on the create New Claim button (2)

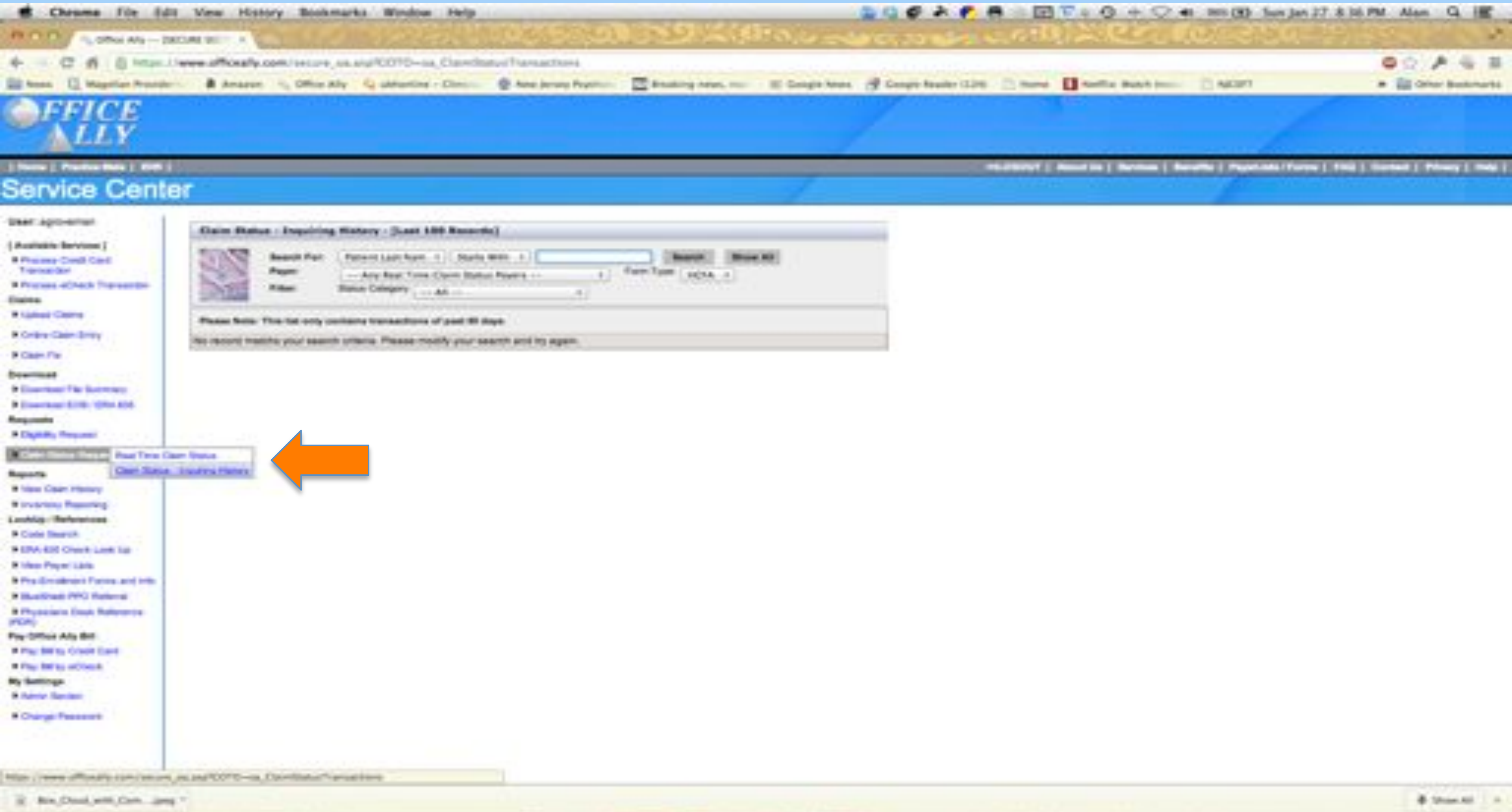


Office Ally Implementation

9. The next screen will show your patient's HCFA form populated with all information except diagnosis and dates of service. Add this information and as in step 5 click on the select button on the bottom left of the screen

Office Ally Implementation

10 To check on the status of a claim log into Office Ally and click on Claim Status Request and select Claim Status- Requiring History. Then follow the on screen instructions to view a patients claim history.



Any Questions, or if you need help with any of the implementations please email me at njpsych@gmail.com