

Secrets of an 'Intelligent' Practice



BY MARK TOSH / SENIOR EDITOR

As many optometrists today recognize, the challenges of running a successful practice seem to mount on a regular basis. There are the day-to-day issues of dealing with managed care and government regulatory requirements, to name a few, and the more operations-related challenges of managing data, connecting with and retaining an increasingly “social” patient population and competing with a new class of online frame and contact lens retailers.

These hurdles often seem to get in the way of the optometrist doing what he or she really wanted to do when choosing this profession:

practicing patient care.

Fortunately, there are also new technologies and other practice-management tools being introduced on a regular basis today that are designed to support the eyecare professional in an effort to overcome these obstacles.

With such a wide array of new high-tech solutions to choose from, it can be a complex decision-making process for ODs who want to add new technology tools to their practice. To this end, *Vision Monday* has reached out to several experienced ECPs to find out how new technologies are helping them operate their practices more efficiently—from data documentation and patient messaging systems—and which technologies they are using to achieve their operational success. ■

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Daily Report Cards Provide Key Benchmarks Among Peer Practices

Peter J. Cass, OD
 Beaumont Family Eye Care
 Beaumont, Texas



Peter Cass, OD, keeps busy as the sole full-time optometrist at Beaumont Family Eye Care in southeastern Texas, where he sees up to 50 patients per day. In addition to seeing patients and managing the practice, Cass also is president of the Texas Optometric Association.

He credits his passion for technology as the critical element that allows him to juggle such a range of responsibilities, and noted that using new technology “is now a necessary part of doing business.”

He added, “I’ve always been a bit of a computer geek and in optometry school I was the first person to bring a laptop to [class]. I knew when I graduated and as soon as I got my own practice that I wanted to go paperless. So I’ve been paperless in my office since 2006.”

Cass said his plans to upgrade and remodel the practice he purchased required that he offset the costs by finding more efficient ways to operate the business, and finding ways to save both time and money. “Technology has been a big part of it along the way,” he noted.

He first got involved with Glimpse Live a little over a year ago, when he was still using a spreadsheet to track

practice performance. “The EHR software does a good job of gathering the data, but it doesn’t do so great a job of outputting the data in a usable, easy-to-read drill-down format,” he said. “That is why I went to Glimpse. A, it automates the data-gathering and B it puts it into very easy to digest formats.”

Glimpse also provides him with capabilities for in-depth analytics and live benchmarking. Cass said the key metrics that Glimpse provides and that he regularly tracks are billing, collection and per-patient revenue. “I want to know what we billed because that is a good indicator of how much money is likely to come in over the next few days or weeks, and I want to see collection because I want to know exactly where the business is at,” he explained.

Glimpse, which was developed by private business owners, calls itself the industry’s first “Push” informatics service that measures and tracks performance, identifies growth opportunities, forecasts future trends and compares results among peers. The Glimpse program interacts with the practice’s database to create daily reports that enable ECPs to instantly track total business performance and anonymously benchmark results against peers both regionally and nationally.

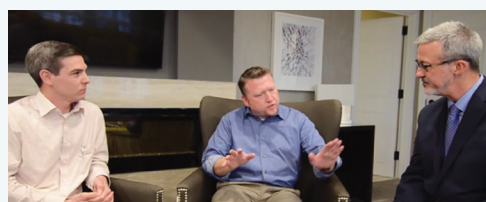
“When I am benchmarking my practice, I am not actually benchmarking it against the average practice,” Cass noted. “I am benchmarking it against a group of better-than-average practices, which really pushes our practice to be the best it can be.” ■

Access to Dashboard Performance Data Can Empower Staff to Adjust

There are many metrics that optometrists can use to chart the performance of their practice. The Glimpse dashboard provides a comprehensive selection of these metrics, and ODs can pick and choose their preferred measures for keeping a close eye on operations.

This is one of the Glimpse Live features that Ryan Witt, OD, and Jason Shanks, OD, of Chittick Family Eye Care in Danville, Ill., noted in a recent interview with *Review of Optometric Business*, a Jobson publication.

Witt said his preferred metrics to review regularly include: average contact lens revenue, cap-



Mark Wright, OD, (r) professional editor of *Review of Optometric Business*, interviews Drs. Ryan Witt (l) and Jason Shanks (c) about their use of the Glimpse Live dashboard program. Watch for the upcoming video on ROB.

ture rate for contact lenses, and capture rate for eyewear, among a few others. These metrics are

reviewed “every week, same numbers, same order, every time,” he noted.

Reviewing the dashboard data is just the first step in empowering the staff to boost performance, Shanks added. “Having access to the information [allows] you actually to begin to feel like you have 100 percent control,” he said. “We will make one shift here and make another shift over here and within just a few days we know that we can gain the revenue increase that we are looking for just by being able to look at it and making the appropriate tweaks.” ■

Secrets of an *'Intelligent'* Practice

Transition to EHR Allows Rhode Island OD to Seamlessly Connect Practice and Patients

Lori Duquette, OD
 Duquette Family Eye Care
 North Smithfield, R.I.

Lori Duquette, OD has been an optometrist since 1998. After first working in an OD/MD practice, she took over an established optometric practice in Rhode Island in 2010. She quickly began to convert the practice from paper records to electronic health records (EHRs).

"When I first took over the practice, electronic health records were coming into use more," recalled Dr. Duquette. "The government was encouraging it. So we went right from a paper-based practice to using Eyefinity. We used their first product, OfficeMate ExamWRITER, which was server-based."

Dr. Duquette's practice then upgraded to Eyefinity's web-based EHR, which featured a patient portal. "The portal let patients input their insurance and demographic information and sign a HIPAA form before their office visit. That was very helpful," she said.

Using a web-based program has many advantages, Dr. Duquette pointed out. For instance, it allows her to respond to patients anywhere, anytime. "I've had patients call the office on a Sunday to renew their prescription, and I can just go to my iPad with my EHR product and do it. It's very easy. Anyone can learn it," she said.

Dr. Duquette and her staff also use Eyefinity's practice management program which is interconnected with the company's EHR program. "It makes it easy to code charts, because the



EHR automatically codes things when I put in the diagnosis when I'm doing my charting," Dr. Duquette explained.

"It seamlessly goes into the practice management program, so when the patient goes to the checkout, the information is already in there. I don't have to constantly go into the IDC code book. This helps us see how well we're doing with Meaningful Use, and it keep us up to date with all our codes, and qualify for our government incentives. That was a major reason for getting Eyefinity EHR."

One of the biggest advantages of using the Eyefinity systems is that it allows Dr. Duquette

to provide more personalized care to her patients. She said that patients have told her that they like having her work on an iPad instead of looking at a computer screen because she can face them while taking notes. "It's less obtrusive, and allows for more human contact," she observed.

Dr. Duquette also likes the fact that Eyefinity EHR lets her send letters to other physicians while the patient is still in the exam room. "It helps with coordination of care, especially when patients see more than one doctor in a day."

Another plus is that the practice's ophthalmic technicians can do more spontaneous testing, in addition to the scheduled testing, a feature that is integrated into Eyefinity EHR. "I can be in the exam room with a patient who's had a visual field test, and then pull it up on my iPad and show them the results. They don't have to come back for a separate visit."

The increased efficiency reduces paperwork for the technicians. It also allows more flexibility in scheduling, so Dr. Duquette and her staff can accommodate emergency patients and fit more contact lens patients, resulting in more revenue for the practice.

The integration between Eyefinity's EHR and practice management software also helps with billing, which is now done in-house. "We used to use a billing company, but now, because everything is integrated, we can send the patient's data straight to our clearinghouse instead of sending it to a billing company first. Our payments come quicker, and that helps our cash flow." ■

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Tying the Office Tech Tools Together With Cloud-Based Systems

Matthew T. Stanley, OD
 Eye Care Associates of Manhattan
 Manhattan, Kan.

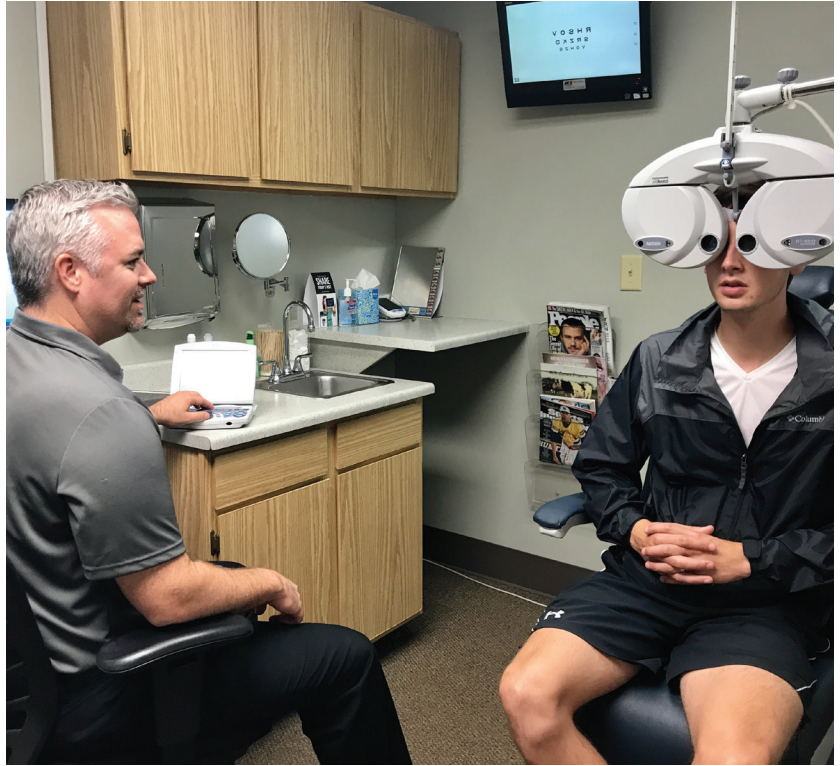
Matthew Stanley, OD, a graduate of Kansas State University and The University of Missouri-St. Louis College of Optometry, cites diagnosis and treatment of disease, difficult contact lens fittings and dry eye treatment as his areas of special interest within optometry. In addition, he said, he's also a tech nerd and "just super curious and interested" in any kind of new technology that will help him improve the operation of his practice.

"There's something new every day that I either hear about on social media or from colleagues and others," he said. "And what we want to be, number one, is as efficient as possible. This makes life easier."

This tech interest has led him to explore and adopt the Uprise practice management system designed by VisionWeb. Uprise is a cloud-based solution designed to operate simply and provide "much more than practice management and Electronic Health Records (EHR)" functions, according to the company.

Stanley said that one of the factors that led to his use of Uprise is the fact that it integrates with other office systems. "We have all of these different pieces of equipment in the office that are really high-tech, and we've also got all of these different ways that we communicate with our patients, from social media, our website or integrated patient messaging software," he said.

"Uprise was the best solution that merged all of this together for us, and that was able to put the last piece into the high-tech area, which is the



documentation of the exam."

Uprise has become the central practice management tool at Eye Care Associates, and it's used for documenting findings, scheduling, submitting orders to suppliers and, among other functions, submitting claims, Stanley said. It also offers a strong patient education program via online video that Stanley said he has found to be an efficient and effective means of providing more in-depth information to patients about conditions and diagnoses.

By adding Uprise, Stanley said he has found "the last piece of the puzzle in terms of making my office really high-tech everywhere." Previously, he said, the practice's EHR was becoming out of date and was server-based. It worked fine, but "didn't do great with all of the new pieces of equipment," he said, noting that the system could make it challenging to go through an exam encounter.

With Uprise, there is no need for an in-office

server, Stanley said. "With our previous software, my server was a \$5,000 to \$6,000 piece of equipment that I had to buy. The server had to be backed up and the data had to be taken off-site [daily]. I had to have an IT technician come in [and set something up]."

This meant, Stanley said, that he had to run the backup operations "at the end of every single business day ... before I could go home." Then he needed to take a copy of all the practice's data off-site just in case the office suffered a power outage or any kind of natural disaster.

Among other important features of Uprise are: long-term user agreements are not required, and there are no annual fees, maintenance or training fees, or additional support costs, according to the company. Because Uprise is a cloud-based solution, the primary access requirement is a web browser. Office device integrations are added at no cost, the company said. ■

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Cloud-Based EHR System Eliminates Practice's Need for Expensive Servers

Chad Fleming, OD, FAAO
Wichita Optometry
 Wichita, Kan.

Chad Fleming, OD, has been in practice for 15 years, and has seen firsthand the changes in practice management for optometrists. After his introduction to the optical business as an optician, Fleming subsequently attended Northeastern State University-Oklahoma College of Optometry, where he graduated summa cum laude in 2002.

He is a member of the American Optometric Association (AOA), Kansas Optometric Association, and a fellow of the American Academy of Optometry (AAO). Fleming's practice, Wichita Optometry, has two locations with four doctors. He and Jeff Yarrow, OD, are the co-owners of the practice.

Business for optometrists is a challenge today, Fleming said. "We're getting our margins cut so much on the business side," he said. The challenge now is to find ways to use some of the new technologies available that are designed to bring efficiency to an OD's practice even as various restrictions on pricing come into play.

"We're one of the few industries where we are topped out on what we can maximize from a profit-margin [standpoint] because almost everything is price-set for us by insurance companies or by mandated discounts," he noted.

Wichita Optometry has just finished its third year using RevolutionEHR, a cloud-based Electronic Health Record (EHR) software for optometry. Because it is a cloud-based system, Fleming said, he has been able to eliminate what was an expensive network within the offices. "We no longer run with servers, and I have only minimal



Versatile EHR software streamlines data collection and review for Chad Fleming, OD, and his colleagues at Wichita Optometry.



IT that I need," he added, which has resulted in notable cost reductions.

One of the features of the RevolutionEHR system is that it is designed to free the optometrist and staff from wrestling with complex computer systems, thus permitting the staff to spend more time caring for patients, according to Fleming.

He also noted that with the RevolutionEHR system "everything else circles around that [system], such as the way we move documents and the way we move data around the office." It also enabled the practice to eliminate its "hard" fax line and discontinue using the local phone company in business operations. "The office now runs as one office with VOIP (voice over Internet protocol), and all the things that allow us as an office and a business to function mobile-ly."

RevolutionEHR also enables some flexibility in scheduling of employees. For example, Fleming noted, that if the office scheduler needs to work at home for family or other reasons, "you can do that with the type of set-up that we created." Optometry is just beginning to incorporate these options, he said, which helps practices "attract

good employees and to continue to move the business forward," he added.

Among key features, RevolutionEHR cites its "simplicity of one" operating principle, which is built around the core idea of bringing an effective and efficient software solution to each practice that "seamlessly integrates with a variety of partner solutions and enables a growing suite of ECP business services" for the practice.

Fleming agreed that the RevolutionEHR system has been a key piece in permitting the practice to link multiple offices together and to "mobilize" doctors and streamline the ways in which they securely interact with their patient charts and patient data, and still remain HIPAA compliant.

He also noted that RevolutionEHR continually provides updates to its application program interface (APIs) to ensure that the system can "communicate seamlessly with third-party software that is within our industry."

He concluded, "This makes RevolutionEHR extremely user-friendly, [and] if they are user-friendly for us, then they are giving the patient a much better experience." ■

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Frames Data Plays a Role in Many Digital Business Ecosystems

NEW YORK—Today's successful retail practice relies on a variety of software platforms and online resources to manage efficiently and effectively. And in turn, those technologies rely on standardized, accurate, and up-to-date product data to power the transactions that keep business moving.

That's where Frames Data comes in. It plays a vital role in these digital business ecosystems, sometimes in obvious ways in the practice (for instance with its website, which ECPs can use to look up frames), but also as a backend database making tens of thousands of transactions a day possible across the industry.

It does this by integrating with various software platforms, making transaction processing faster, easier and more accurate.

- **Practice Management (PM) and Electronic Health Records (EHR) Software:** to support inventory management, sales reporting, patient records, managed



care claims, POS functionality and other features. Anywhere in the system that frame information is used, Frames Data is helping to improve the experience and encourage a deeper implementation of the software functionality in the practice.

- **Lab Management Software:** technical frame specs facilitate accurate, efficient lens processing at the lab, and can even speed up job processing.

- **Web-based Systems:** such as VisionWeb and Efinity, for product ordering and managed care claims. Selecting a frame with a pre-populated drop-down list is both easier for the provider and much more accurate than entering it in by hand, and IT vastly improves both the customer experience and the processing of the order/claim.

- **In-store Technologies:** such as VSP's otto iPad app and Smart-ID by Eye Designs which uses RFID (radio frequency identification) tags to showcase products, help educate consumers and unlock additional retail marketing opportunities.

As new technologies for better selling and merchandising emerge, Frames Data will continue to be at the forefront of automation to help retailers make the most of their intelligent office eyecare investments.

Frames Data is part of the Jobson Optical Group. ■

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Automation and Outsourcing Enable More Time for Patient Care

Steve Wilson, OD →
Wilson Eyecare Associates
 Williamson, W. Va.

Steve Wilson, OD, is a second generation optometrist practicing in West Virginia. After graduating from Southern College of Optometry in Memphis, Tenn., he joined his father's practice in 1982. Years later, he was instrumental in the office's move to a 3,200-square-foot freestanding location where it operates today.

Technology and innovation—including strategies that make the practice more efficient and permit more time for patient care—continue to be among his main interests. “We are trying to outsource as many things as we possibly can, we really are. If we can focus the attention of our practice and staff on excellent patient care, then everything else takes care of itself,” Wilson said.

The Wilson Eyecare practice currently uses EyeCare Prime's Prime Nexus software, a cloud-based patient relationship management system that offers an intuitive user interface and enhanced functionality. (EyeCare Prime is a wholly-owned subsidiary of CooperVision.) The Prime Nexus software follows EyeCare Prime's earlier patient relationship management software, WebSystem3.

“We were a WebSystem3 user,” Wilson said. However, with the Prime Nexus version, there are “enhancements in the software that have really been helpful to us. We're already seeing a blip on the radar screen of improvement.”

For example, Wilson said, Prime Nexus, which integrates with the practice's OfficeMate (from Eyefinity Inc.) practice management software, is designed to communicate simply and effectively with patients via text messages.



Wilson Eyecare has found success with text messaging patients.



Steve Wilson and Shawn Simmons are the practice's ODs.

The system sends a text message to a patient that says “we are looking forward to seeing you at the appointment tomorrow afternoon,” Wilson explained. When the patient confirms that appointment with a text response, Prime Nexus sends a notification text to office personnel and also adds the appointment confirmation into the practice management software.

“Now, we can simply look into our appointment schedule and it will tell us that [the patient] has responded,” Wilson said. He noted that the Prime Nexus system is set up to help practices maximize their bookings and to improve patient retention.

“This is really, really powerful for us,” he said. “We certainly don't want to over-communicate with our patients, but I think the realization that we have come to is that everybody today—even granny—has a cell phone in their hands.”

In the previous CRM program, the patient coordinator received an email with the patient's appointment confirmation and then manually documented this information into the office scheduling system, Wilson noted. Prime Nexus is designed to communicate with patients in three different ways: text, email or a traditional telephone call, and it documents which of these

tactics the patient responded to.

“What this does is to make sure my front-office coordinator doesn't have to spend half of her day on the telephone reaching out to people and their answering machines,” he said.

Other features of Prime Nexus are: a mobile-friendly post-appointment survey program that can send requests to patients via text message and a streamlined online review posting and dedicated web page function, which allows completed reviews to automatically be published on a dedicated practice review web page to save staff time. There's also a dashboard feature showing key practice performance metrics.

Wilson said he believes the text-messaging function of Prime Nexus has produced more positive responses to accounts receivable communications with patients. “If we are trying to get a hold of someone regarding an account that's exceeded a reasonable period of time, when we send them a text there's a high percentage of the time they are going to respond to that text,” he explained.

“It's human nature that a text grabs our attention. If we can respond to that easily and simply, we are going to do so.” ■

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EMR System Allows iPad Use and Puts Patients Front and Center

Ernie Bowling, OD
MS, FAAO

Gadsden, Ala.

For the past four years, Ernie Bowling, OD, has been using drchrono software at his two-location solo practice in northeast Alabama. Having been initially impressed with the capabilities of a free, beta-test version of the software, Dr. Bowling has since become an enthusiastic customer, largely because drchrono offered a solution to his practice's pressing need for a modern, flexible EMR (Electronic Medical Record) system.

"We had to do something in our office. The filing cabinets were overflowing," he explained. Dr. Bowling, a veteran practitioner who had previously used some forms of EMR, had a clear idea of what he was looking for.

He said, "I did some research and had a checklist of what I needed the platform to do. It was pretty simple at the onset. I wanted an electronic medical record system, but I wanted it to be iPad-based. I liked the freedom of movement with the iPad and did not want to place a monitor in each exam room. If you're not careful, you end up talking to the CRT screen, not the patient, and I didn't want that."

A key reason Dr. Bowling chose drchrono was because he wanted a Mac-based platform. "I personally feel the Mac platforms are more intuitive, and the learning curve is not as steep. I also wanted a cloud-based system. I had used an in-office server in the past but was not happy with that system."



Having an EMR system that was easy to implement and use was a priority for Dr. Bowling and his staff. "My staff and I, we're all long in the tooth, shall we say. I wanted something they could learn quickly," he noted.

Dr. Bowling also likes the fact that drchrono is customizable. "I didn't want to have somebody else's template and have to plug my data into theirs," he said.

Now Dr. Bowling has six iPads that he and his staff use at their two practice locations that all run drchrono software. However, he and his staff don't use all of the software's capabilities, such as billing, patient recall, appointment confirmation, email and text messaging, although he is considering how to take advantage of some of those features.

"I am always talking with my staff about how we are still not making optimal use of all the bells and whistles the system provides. For ex-

ample, it does online appointment scheduling and will notify the patients of their upcoming appointments electronically if you so choose. I do not use their electronic claims filing, but it is another one of those technologies we need to make use of."

Dr. Bowling's biggest concern about switching to an iPad-based system was how his patients would like it compared to the traditional paper-based medical record system they were used to.

"There were some initial hiccups but I was very surprised at how readily most of my patients adapted. There have even been comments about how high-tech we are. I found it amusing that when word got out that we were adopting electronic records many of my senior patients brought their grandkids in to help them with the process." ■

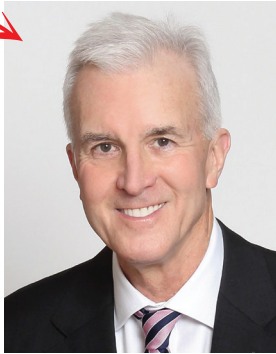
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Easy-to-Read Reports, Clean Interface Are Dashboard Must-Haves

Thomas P. Arnold, OD →
Today's Vision
Sugar Land, Texas



A 1984 graduate of the University of Houston College of Optometry, Dr. Thomas Arnold has been the owner of Today's Vision Sugar Land since 1992. It is a very busy single-location practice with three doctors on staff, said Arnold, who also has been a member of the Laser Eye Institute of Houston's board and an adjunct faculty member at UH's College of Optometry.

There are many things that are important to running a large optometry practice today, but when it comes to managing the performance of his office and staff there are only a couple that really stand

out for Arnold: timely access to relevant operational data at the touch of his fingertips.

This is especially critical when the practice sets specific goals and needs to track its progress against those targets. "I'm sure you are familiar with the adage that if you don't measure it, you don't do it," he said. "But if you measure it, you can change it; if you measure it, you can affect it,"

he added, noting that no one loses weight without weighing themselves to chart their progress.

So, in evaluating office dashboard programs, timely access and an easy-to-read presentation of the data are the factors he uses in selecting a solution. Arnold has been using GPN's The EDGE office dashboard solution for at least seven years, and he recently tested a version of EDGEPro, an enhanced version of The EDGE analysis software.

In his experience with The EDGE dashboard, Arnold said he likes that the presentation format is easy to understand and requires very few clicks to

drill down into deeper analysis within the reports, without needing to access this data via layers of connected spreadsheets. "It drives me crazy to have to click here, and click here and then click there," he said. "[With The EDGE], with two clicks or maybe three clicks you are looking at whatever data you want. It's a very clean interface, and it works independently of your office management system."

In addition, he said, The EDGE solution doesn't require changes to the way data is entered in the practice's daily operations; The EDGE pulls the "data you already have."

Another feature of The EDGE and EDGEPro solutions is the ability for the practice to look at a wide range of performance benchmarks. Arnold said, one of the features allows the user "in whatever timeframe you are looking at" to hit a "compare" button that will run the data to create a relevant comparison to the timeframe chosen by the user.

Arnold also likes to have the option to track different aspects of the practice on a daily basis, and noted that The EDGE offers strong metrics for a variety of performance categories, such as what the cost of goods should be, forecasts for frame turnover, average frame sale, and add-on sales, among other metrics.

There are more functions like this with the expanded EDGEPro platform, including features highlighting lost revenue opportunities, upgrades to the functionality for benchmarking, tracking, and spotlighting the relationships between products, services and fees. EDGEPro also has improved mobile accessibility, which permits users to view their data from any hand-held device.

On a broader aspect, GPN holds twice-a-year customer meetings that feature informative focus groups and role-playing exercises, Arnold said. "They bring a lot of value to this whole thing. When I talk to people about it, I say 'It's like having a partner with no drama,'" he said. ■

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