What to Prioritize When Selecting Software for Small Medical Practices

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Being a smaller medical practice has its advantages, such as the ability to be more agile and provide more focused care to your patients. But those advantages come with a cost. Smaller practices often work with fewer resources and less supporting staff, so individuals are forced to fill many roles: administration, financial management, IT support, and more must be addressed by everyone on staff, rather than by specialists.

When each staff member wears multiple hats, heavy lifting from technology can make a world of difference — at a much lower cost than hiring additional full-time support staff.

Practice management software and electronic health records are critical to managing healthcare information and providing exceptional service and care to patients. However, selecting the right software systems for your practice is essential. Every medical practice is unique — it's important to choose software that serves your unique needs, and doesn't limit your team's capabilities.

If you're considering upgrading your practice's software systems, or starting your own small medical practice, use this guide to help you consider and document what features you might need and potential roadblocks you could encounter to ensure you can create smooth, sustainable systems for managing your practice and patients.

The Unique Challenges of Small Medical Practices

When medical providers go to work with large healthcare systems, they must apply their skills within already- established processes. They enjoy a framework to work within, and veteran providers and staff to guide them through standard operating procedures when questions arise.

On the flipside, small medical practices enjoy more flexibility, requiring less energy to adapt providers, staff, and patients to new systems and workflows. These small practices are more agile and changes are easier to implement simply due to scale.

When building or rebuilding technological systems to support a small practice, identifying what problems you're trying to solve is step number one to finding a solution. We've worked with hundreds of providers within dozens of specialties, and here's what we've learned are the top challenges small practices face.

Limited resources

Independent practices often have limited financial and human resources, making it difficult to invest in advanced technology, hire specialized staff, or implement robust administrative systems. They may also struggle to compete with larger practices in terms of service offerings, infrastructure, and marketing.

Administrative burden

Small practices often have limited personnel to handle administrative tasks, and using insufficient or outdated practice management software can increase the burden on these team members. Small practices may struggle to find qualified and experienced staff members who can efficiently manage scheduling, patient registration, medical records, and other

administrative duties. Staff turnover can also disrupt workflows and increase recruitment and training costs.

Security and compliance

Compliance with healthcare regulations and reporting requirements, such as HIPAA (Health Insurance Portability and Accountability Act) and meaningful use criteria for electronic health records (EHR), can be demanding for small practices. They may lack dedicated compliance officers or staff and may need to allocate additional time and resources to ensure adherence to these regulations.

Financial management

Small practices often have to manage tight budgets and contend with lower reimbursement rates from insurance companies. They may face difficulties when negotiating favorable contracts and may not have the bargaining power of larger practices. Financial stability and managing cash flow can be significant challenges.

Technological support

Implementing and maintaining electronic health record systems (EHR), patient portals, and other technological solutions can be costly and time-consuming for small practices. They may lack the expertise to select and integrate the right systems, train staff, and handle technical issues that arise.

A small practice's specialty may add additional requirements, limitations, and challenges to their operations, but most small practices share many of the same burdens. To overcome these challenges, small practices can consider outsourcing certain administrative functions, leveraging technology solutions tailored for their needs, investing in staff training and development, and seeking professional guidance on regulatory compliance and financial management.

Questions to Ask When Selecting Software for Your Medical Office

Because of all of these unique challenges, technology can serve as a virtual assistant, supporting your office staff. Some tasks require a human touch — but for the ones that don't, letting technology do the work for you can save your practice time and money.

We've broken down the top features that reduce administrative burden without compromising on an excellent patient experience. If you're in the market for a new software, consider the following questions:

What do I need to effectively schedule appointments?

Scheduling an appointment is often the first interaction a new patient has with your practice, so it's vital to have a clear, intuitive system in place to make a good first impression. Whether being used by administrative staff or by patients choosing to self-schedule, robust scheduling features allow for easy appointment creation, rescheduling, and cancellation. It should also support multiple providers and offer flexible time slots.

Questions to ask:

- Does this software allow patients to schedule their own appointments remotely?

- Does this software allow scheduling staff to filter available time slots by provider, equipment, or other criteria?

- Can this software send customized appointment reminders to patients?

How can I streamline the patient onboarding process?

Before providing care to a new patient, practice staff need to document the patient's demographic information, medical history, insurance details, contact information, and more. Making these questions and forms digital and available to patients long before their appointment means less paperwork to fill out and less data entry required of administrative staff at the time of the appointment.

Questions to ask:

- Does this software offer secure, digital patient intake forms?

- Does information entered into patient onboarding forms automatically feed into other patient management systems (like EHRs)?

- Can the information entered into these forms by patients be easily located by practice staff?

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# Is it straightforward to bill patients and insurance?

Medical billing can be a complex process, especially for small administrative staff filling multiple roles. A billing module that can generate and process invoices, manage insurance claims, track payments, and handle billing reconciliation allows staff to easily track where patients and insurance providers are in the billing cycle, and what needs to be done next to keep the revenue cycle running smoothly.

Questions to ask:

- Can this software automatically generate itemized invoices for patients?

- Does this software include an online bill pay solution?

- Is this billing software built to interface with insurance systems via CPT and ICD codes?

- Does this software offer support and remediation for denied claims?

Can I analyze practice data and create insightful reports?
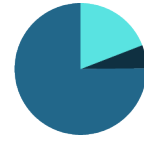
Another advantage large healthcare systems can enjoy is the ability to hire and retain staff dedicated to supporting and improving workflows throughout the organization. With the right software, small medical practices' staff can use a reporting module to provide detailed insights into the practice's performance, including financial reports, productivity metrics, appointment statistics, and patient demographics.

Questions to ask:

- Does this software collect and track performance-related data throughout the entire practice ecosystem?

- Does this software allow users to define and customize the data points they want to track?

- Does this software meet Meaningful Use requirements and generate MIPS reports?

- Can this software convert large bodies of data into easy- to-understand dashboards and visualizations?

Is my software HIPAA compliant?

There are countless software systems and digital tools available to track customer data and communication, but medical practices have unique security requirements due to Health Insurance Portability and Accountability Act (HIPAA) regulations. Patient data needs to be accessible to the patient whenever they need it, but it must also be fiercely protected from any unauthorized parties. Because of this, medical practices must use purpose-built medical software that is compliant.

Questions to ask:

- Is this software HIPAA-compliant?

- Does this vendor continuously evaluate and improve security features based on industry-wide and regulatory changes?

Vendor Support Can Help You Customize Your Practice Management System

A software solution is only as good as the support team behind it. With lots to juggle, one thing you shouldn't have to worry about is getting support for your tech stack when you need it. Some vendors onbboard customers then take a hands-off approach to configuration and support. Other vendors maintain databases and address problems with their software, but have no part in the setup and incremental improvements to individual practices' systems.

Most small practices will need ongoing support from their vendors to tweak data fields, automated processes, and more, but it's impossible to know what needs might arise in the future. Consider how much and what kinds of support a software vendor is prepared to provide to you and your team before making any commitments.

Questions to ask:

- Does this vendor provide 24/7 customer support, or is support only available during business hours?

- Will this vendor provide a dedicated 1-to-1 support specialist for your team?

- Is there a guaranteed response turnaround time?

- Where is the support team based?

Watch our video to learn more:
Customer Support at Benchmark Systems

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Integrations That Can Help

One of the most valuable capabilities for software in small medical practices is interoperability. Interoperability refers to software's ability to interface or communicate with other, unrelated software systems. By prioritizing interoperability when selecting the right software solutions for your practice, you have more options to save time with additional digital tools and the automation they can provide.

An interoperable system can serve as the bridge between disparate systems, connecting patient health records with billing software, external specialists' systems, customer relationship management systems, marketing tools, and more. The more tools your digital systems can connect to, the less time staff will have to spend on transferring data manually from one system to another.

Some helpful integrations for small medical practices include:

Electronic health records

When practice management software can seamlessly connect with patients' electronic health records, information can flow freely and instantly between the administrative staff responsible for scheduling, billing, insurance processing, and the clinicians providing and documenting care services. There's less room for clerical errors, miscommunication, and missed revenue.

> Watch our video to learn more:
> **Top Features of Benchmark EHR**

Patient portals

Patient portals allow patients to sign in and interact with your medical systems whenever and wherever they are available and comfortable. Patients can view their medical records, test results, invoices, upcoming appointments, and more, keeping them health conscious and helping them make better informed health choices. Patients can also use portals to pay bills online, meaning less time staff spend in person or on the phone processing payments.

Watch our video to learn more:
Benchmark Systems Patient Portal Demo

Revenue cycle management services

Medical billing can be a complex process — so complicated that medical billing experts often complete specialized training and earn higher salaries than other administrative staff at small practices. If hiring medical billing specialists is not within your practice's budget, revenue cycle management services can help your medical practice maximize reimbursements, minimize coding errors and claims denials, and identify opportunities for revenue growth.

Watch our video to learn more:
Benchmark Systems RCM Services

Use our evaluation rubric to calculate and compare software scores.

1. Write in the level of priority for each category based on your needs, with 1 being the lowest priority and 5 being the highest.

2. Check the box on each feature a vendor's software includes.

3. Multiply the number of checked boxes in each row by the priority level.

4. Add up all the rows' weighted totals for a final score between 0 and 45.

	Priority Level	1	2	3	Weighted Total (Row Total multiplied by priority level)
Scheduling		☐ Patients can self-schedule.	☐ Staff can filter calendar by criteria.	☐ System sends automated reminders and alerts	
Onboarding		☐ Secure digital patient intake forms.	☐ Onboarding forms can connect to EHR.	☐ Patient data can be easily searched and retrieved by staff.	
Billing		☐ Automatically generates itemized invoices.	☐ Suggests CPT and ICD codes for billing.	☐ Includes medical claim denial management system.	
Reporting		☐ Software tracks practice-wide performance data.	☐ Staff can customize reporting criteria.	☐ Data fed into data visualization dashboard.	
Security & Compliance		☐ Software is HIPAA-compliant.	☐ Staff can create new password-protected user accounts.	☐ Vendor is responsible for updating system according to new regulations.	

Sum of weighted totals: _____

(Score out of 45)

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How Benchmark Systems Stacks Up

Benchmark Systems has been working alongside healthcare systems and practices of every size throughout our decades of service and experience. We understand what needs large, small, specialty, and private practices have in common — and how they differ from one another.

We've built our solutions according to our checklist of requirements for any practice. Our software:

- ☑ allows patients to schedule their own appointments remotely
- ☑ allows scheduling staff to filter available time slots by provider, equipment, and other criteria
- ☑ sends customized appointment reminders to patients
- ☑ is HIPAA-compliant and continuously evaluated and improved based on industry-wide and regulatory changes
- ☑ collects and tracks performance data throughout the entire practice ecosystem
- ☑ allows users to define and customize the data points they want to track
- ☑ converts large bodies of data into easy-to-understand dashboards and visualizations
- ☑ comes with Benchmark Systems' exceptional customer support

Our practice management software was designed to be customizable to make administrative work easier, faster, and more effective, no matter what processes you employ. We've built a powerful, secure framework around which to build the perfect system for your organization.

If you'd like to learn more about how our system can address your current pain points, please contact us for a free consultation.

Contact Us!

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