

Case in Point

Starting Up a Pediatric Practice With Office Practicum

by Judy Knight, MD

Office Practicum

CAPABILITIES: Full electronic practice management tool, including medical record (EMR), scheduling and billing, complete ICD-9 and CPT code search and find functions, report generator, database supporting simultaneous use by multiple users (including scheduling), back-up system, and CDC-based vaccine algorithm with detailed vaccine tracking.

PRACTICE SETTING: Solo pediatric practice (soon to be a multi-physician practice) using Office Practicum from the outset, 1.5 years ago. The practice currently employs 1 part-time practice manager and 1 part-time office clerk.

RATINGS: (1 = poor, 5 = superior)

Performs stated functions:	5
Content:	5
Documentation:	4
Error handling:	5
Ease of use:	4
Value for price:	5

GOALS OF THE EMR SEARCH

In searching for an EMR, I wanted to find a package that would help me to increase my efficacy as a physician, to reduce my paperwork, and to eliminate the need to use my poor handwriting. I desired efficiency, as I was start-

ing out as a solo practitioner with no office staff. In addition, I was seeking portability, and the ability to move from one office to another with only a disc or laptop.

OVERVIEW

This package was developed by the husband of a pediatrician who worked in a busy Brooklyn practice. It was tailored to handle the particular needs of pediatric practices. In addition, it was simply the best designed EMR in terms of layout, ease of use and depth of content. I reviewed other products prior to Office Practicum, and there was no question in my mind as to which would best suit my needs. I felt quite certain that the high quality of the program and the accessibility of the developers and support would provide great savings in workload and decreased.

The main users of this software are multi-physician pediatric practices; notwithstanding, the bulk of the program is general. It has been modified for use in an AIDS clinic, a women's health/family practice group and a podiatry practice. Modifications for the podiatry practice included changing the face page by eliminating some of the pediatric-specific fields and adding additional space for medications, and a post-op note. There are elements of other EMRs which Office Practicum does not yet offer, including an integrated laboratory input system, and an integrated formulary with drug interaction alerts. These pieces not critical to pediatric outpatient care, and were not an issue for this reviewer.

Medical Efficacy: I wanted more algorithms for medical decision making than I could find in any of the EMRs reviewed. Office Practicum has done as good a job as any in this regard. I appreciate the customizable templates and phrase builders. Uniquely, the pre-programmed templates were relevant to pediatrics.

Paperwork Reduction: There is no getting around the need to handle paper. Nonetheless, one can enter the relevant data into the program, and then discard or scan. Either way, the actual physical paper is gone, and the information is "filed" in some bytes of memory, and easily retrieved. Scanned items are grouped and categorized within the patient's file.

Efficiency: The developer of Office Practicum, Fred Pytlak, has repeated his mantra to me several times over the last one and one half years that a user should never have to input the same information more than once. The school form report generator is a great example of this: Never again will I have to copy the vaccine dates from one piece of paper to another.

Portability: While working alone without staff, I carried my laptop EMR from my home office to my main office and saw patients wherever needed. Now, with a static URL address, I will soon be able to call in from any online computer and reach my office server.

PROGRAM FEATURES AND CHARACTERISTICS

Starting Up: When you first open up Office Practicum, you see a clean blue screen with buttons for the main functions at the bottom, and drop-down menus at the top. The main buttons at the bottom include "front-desk" functions (register, insurance, schedule), medical functions (chart, chronology, reports, scan review, check list), "back-office" functions (account, superbill, billing), and general functions (message, scan input, address). These buttons direct the user to several main modules: Scheduling, Chart, Billing/claims, Scanning, Reports, and Messages.

General Navigation: Navigation through the main modules is quick and easy. The pull-down menus offer rapid access to areas within these modules e.g. the Utilities drop-down menu includes Vaccine inventory, CPT and ICD-9 code management, System administration and more. The other drop down menus include: File, Work Areas, Reports, Correspondence, Records, Log In/Log Out, Help.

Practice Management: The program basically allows you to minimize data entry and facilitate movement from one

module/work area to the next. It is particularly practical for a solo practitioner because of this streamlining of work flow. For example, vaccines given and the fee for administration are automatically entered on the superbill, as are labs with fees. A school form can be generated with a few keystrokes, printed on the image of our state's official certificate of health. Large offices benefit from this reduction of paperwork, allowing staff to devote more time to more meaningful work. The billing function is helpful to a soloist, because it grants a small operation the ability to process managed care documents. The Reminders are also beneficial to a soloist or small practice, when there are few people to divide work flow.

EMR Features: Here, too, the program shows good design, because it divides the encounter or preventive visit format into fields. There is a field for HPI, separate fields for each system examined (General, HEENT, Lungs, etc), and fields for Assessment and Plan. There are then fields for ICD-9 codes, which facilitates the generation of well-organized notes. Also, one can quickly jump to the template chooser, and pick (or develop) a template for any given problem, so that the visit can be recorded even more efficiently.

Printing: Reports are easy to generate, and can be automatically viewed before printing.

PREFERRED FEATURES

Reports: There are a few features of this program that are of enormous value to a pediatric office. One is the report generator, which is customizable. This component will print out our Illinois Certificate of Child Health (school form) filling in all of the necessary vaccine dates, vitals, labs and latest physical exam. Any form which requires information from the program can be scanned in and customized.

Vaccines: The second unique and wonderful feature is the vaccine algorithm, based strictly on CDC guidelines. Having entered all prior vaccinations, the program provides current immunization requirements for the child on each visit. Vaccine inventory is tracked, with lot numbers entered at receipt of the vaccine. When a child is immunized, the lot number is automati-

cally recorded. The user is prompted for the Vaccine Information Statement date and it is recorded with 2 keystrokes. Patients are surprised and pleased to receive a printout of a vaccination history, with a timetable of future required immunizations.

Growth Charts: The third great feature is the growth chart, in which weight, height, head circumference, BMI are all plotted on standard charts. These are more accurate than can be plotted by hand, and can be immediately viewed and printed out for the parent. Vital signs can be plotted over time as well, and this plotting is customizable, so that any numerical data can be tracked over time.

Layout: The visual and structural layout of the program are intuitive, well-organized, and practical. Opening a patient file takes you to the chart front page. The front page includes a photo of the patient, a "To do" checklist for today and for the future, a problem list, medications, allergies, vaccine requirements and health summary. From there you can click to an event chronology, a new encounter, a new preventative exam, growth chart, vital signs, developmental/birth history, medical history/review of systems, medications, labs, immunizations, and referrals. Other program utilities and work areas are always available from menus above and below, including registration and insurance information, billing areas, security maintenance, and correspondence.

User-Friendly: A lot of thought has been put into this system, and how it might meet the needs of a busy medical practice. This is reflected in many ways, including new patient input. When a new patient is being entered into the system, the program automatically searches for the name and birth date. If a duplicate or near duplicate is found, a message pops up to alert the user.

ADDITIONAL CONSIDERATIONS

Database: The database accommodates multiple users concurrently. Even scheduling can be done in tandem at different locations in an office, as it is updated whenever information is entered and saved. The only time this cannot work is when two people

attempt to access the same field in the same record, but my impression is that this is an uncommon event.

Installation: Visual Data, LLC believes that "Software is a service industry." They have been accessible from day one and gave me the initial training I required when I needed it. Much of the program is intuitive, so more often the issues to be resolved concerned hardware. Visual Data, LLC paid attention to these problems and worked with me to resolve them expeditiously. For larger practices, there is a preimplementation phase. This phase includes planning for both the hardware/networking, and the psychological impact of change in an established practice. Visual Data works with the leaders of the practice to develop strategies for a smooth transition. The company provides a video demonstration to introduce the program to your practice.

Support: My system has never gone down in the 1½ years of my use of Office Practicum. Support has been excellent, with Visual Data responding to urgent needs immediately, and non-urgent problems within 24 hours. Use of remote control software (e.g., Symantec's pcAnywhere) allows Visual Data's staff to view the computer and resolve issues quickly.

Practice Management: The physician clicks on the required ICD 9s and CPTs at the end of the visit; vaccine-related and lab charges are automatically added to the superbill. This starts the cycle of the claims and billing function, which is fully functional for all contingencies met in a medical practice. It is thus somewhat complex, and requires direct training from Visual Data's billing support staff.

Soon after I began to accept third-party payers, I hired a practice manager, who handles the EOBs. Surprisingly, electronic claims submission was one of the easiest parts of the system to learn and perform. We submit our claims to MCS clearinghouse, requiring no annual fee.

Physician Reminder Capabilities: Customization is available in several areas of the software. The encounter and well-visit templates contain a written history, physical, assessment, plan and ICD-9, which can be altered as

needed. For example, we prompt ourselves at the 9-month visit to ask the Lead Risk Questions, and at the 1-year visit the TB risk questions. In addition, well-visit phrase builders have all the Bright Futures preventive guidelines, which can be clicked as each topic is covered. I like to establish a template when a patient is coming with an uncommon problem. This prompts me to ask the right questions and avoid repeating the research for a similar patient in the future.

Other reminders include a box to quickly check "ROS and Problem List reviewed and unchanged." Well visits and sick visits have phrase builders, which are grouped and categorized. Thus at your fingertips are all the relevant topics to cover for the problem you have selected. You can change and supplement the phrases provided.

Messaging: Office Practicum has a fully functional messaging system, which cues the user at log-on with a red telephone icon if there are messages waiting. Messages can be sent to the whole staff or to individuals. They can be saved and categorized.

Scanning: A good, fast scanner is a valuable piece of equipment, as it is a key component of maintaining a paperless office. When records, consult letters, or questionnaires are scanned, they are grouped and categorized within the patient's file. This includes date of the material, date of receipt, date of review, and any notes desired. The scans are crisp and clear, and easily retrieved and reviewed. They are included in the patient's chronology, so that they are well-integrated into the chart.

Scheduling: Due to the current solo status of the practice, I keep my appointments in my PDA. The scheduling software in the program seems to be highly functional and customizable, and when my practice grows I'm sure I will avail myself of this module. When appointments are made, the vaccine algorithm kicks in and shows when vaccines are needed. This can assist in avoiding scheduling infants/children before minimum intervals have been met. In addition, at the time of scheduling and check-in, the balance and the last physical come in view. Patient flow is monitored as well, as you can see

who is in the waiting room, who is in the exam room, and how long they have been waiting.

Data Security/HIPPA: Each user must sign in individually and Office Practicum is able to trace actions to who performed the actions. If a user tries to sign in elsewhere, she is automatically logged off in the prior location. Data transmission is tracked as well. Printing a report is followed by prompts to select the recipient of that report. Firewalls such as routers are recommended to prevent hackers from retrieving data.

DRAWBACKS

I do minimal tracking of labs, and few labs altogether, so that entering lab values manually or scanning in reports doesn't present a major problem for me. However, the ordering of labs is a bit cumbersome. This may be a computer task that I delegate as my practice expands.

Ideally, scheduling would sync up with my PDA, but this is currently unavailable in this system. Integration of a drug formulary would also be nice as well. What the program does have is some preprogrammed prescriptions in the medications section, and a fully customizable phrase builder to add more medications as needed. I tend to program in any prescriptions that I write as I see the patient, as it requires only a few more keystrokes.

RECOMMENDATIONS

At minimal expense, the purchase of Symantec's pcAnywhere facilitates off-site information technology assistance. The program allows your computer to be viewed and controlled by someone offsite, usually via a broadband internet connection. Having this in place allows the staff at Visual Data to solve problems quickly and efficiently. In addition, it can be used by potential buyers to demo the product.

One key purchase for an office buying an EMR is a high-quality speedy scanner. I had been using my all-in-one HP which worked fine for printing and faxing. For scanning, it was slow and limited use of the computer while a document was being scanned. As the volume of new and return patients increased, and the "charts to be

scanned" stack started to build, I knew I was in trouble. I finally invested in a new scanner that has changed my whole outlook. I have had some huge sighs of relief just watching the paper whiz through and into the shredder.

Another key purchase is high-speed Internet access, to allow communication from one office to another. Options for this include DSL, cable and satellite. I have had very consistent service with cable for the past four years in my home and with DSL in my previous office space.

The Office Practicum product includes a powerful back-up system. We have not suffered any loss, and Office Practicum has suffered no permanent losses due to the care taken in this regard. We have back-ups of our main patient files to our server and to a client hard disc, but we further employ an on-line back-up service.

SUMMARY

I am thoroughly pleased with Office Practicum and would highly recommend it to any pediatric practice. For other practices, it is a great tool, and it seems that Visual Data, LLC is willing to customize the product. They are currently working on integrating electronic lab entry, which will be a major asset. This is a stable company committed to excellence; it offers personal attention to problems and a consistent team of technical supporters.

Editor's note: MSR's Case-in-Point features, like Dr. Knight's report on Visual Data's "Office Practicum," are evaluations of complex programs, such as electronic medical record systems, by physicians who actually use the programs in their practices. MSR's strict disclosure policy requires us to report that Dr. Knight is a customer of Visual Data. She has no financial interest in or other relationship with Visual Data, LLC. However, Visual Data offers discounts to Office Practicum users who recommend the system to new customers, and Dr. Knight may receive such discounts when practices purchase the software on her recommendation. She receives no discounts or other financial considerations from purchases that may result from this review.

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