



# Fast & Compliant Notes for Chiropractic Practices

by Reuven Lirov, M.A.

## A Case of Writer's Cramp

Ben sat at his desk shaking out his hand, which had cramped up after 10 minutes of concentrated writing. He knew how important it was to provide accurate documentation of patient visits but capturing every detail in writing, then making Luisa type it into the computer, was eating up valuable time for both of them. Plus, Luisa was forever complaining about his handwriting, which he admitted was difficult to read.

There was a knock on his office door. "Come in!" he called.

Luisa entered with a smile. "Hello, Dr. Ben, I was wondering if you had a moment," she asked.

"Of course, Luisa, what's on your mind?" Ben asked.

"I've been working on entering your patient notes from last week and it's taking me a long time," she explained. "I know you try to be thorough but

there are times when I need to extrapolate certain tidbits of information based on what I know about the patients."

"Well, we're all taught when we go into medicine that if we don't write it down, it didn't happen," said Ben. "I do try to capture every detail I can."

"And I do appreciate your efforts," said Luisa. "But I'm not just dealing with the SOAP notes—I need to include images, forms—such as Medicare, intake and verification of benefits—lengthy tests and more." "How much time would you say this is taking you in any given week?" asked Ben.

"I haven't tracked my time but it takes hours," said Luisa. "Not just in typing and attaching related documents, but also in touching base with you when I have questions that I can't figure out from your notes or past patient records."





That takes time away from your day—and your patients—as well.”

“It used to be so much simpler,” mused Ben. “When I opened this practice, I could scribble myself some notes, stuff them in the patients’ paper files and forget about them until the next patient visit. I was able to spend so much more time with my patients!”

“It’s not just about spending time with the patients,” said Luisa. “Our goal is to help patients get better, and to feel so much better that they feel compelled to bring family and friends who may be suffering to see you as well.”

“That’s true—we need happy, referring patients to make the practice grow,” agreed Ben. “I wish there was a way to keep accurate, compliant notes in less time.”

“You mean besides taking that handwriting course I’m always nagging you about?” teased Luisa.

*Is there a way to reduce the investment of time in documentation so that Dr. Ben can focus on his practice and his patients?*

## Cooking Up a New Plan

Ben arrived home after a busy day to find Carmen reading to Jonathan on the couch. He swung Jonathan up in his arms and gave him a firm hug.

“How was your day, Daddy?” asked Jonathan.

“It was so busy,” Ben said. “I’m tired but very happy to be home!”

Jonathan gave Ben a big hug back, then turned to Carmen. “Mommy, I’m hungry,” he announced. This was not surprising, because Jonathan was always hungry.

“Jonathan, why don’t you go upstairs and finish your homework,” said Carmen. “Your daddy and I will get started on some dinner for everyone.”

Carmen squeezed Ben’s hand as they walked toward the kitchen.

“So tell me about your busy day,” Carmen said.

“Well, Luisa and I had a really good conversation this morning and I’ve been thinking about it all day,” Ben said. “We’re both getting pretty frustrated with patient notes. I have to write everything down—every single detail of each patient visit—and then Luisa has to take my notes and enter them into our system, along with images, forms, test results and more.”

“That sounds like you’re doubling the work for yourselves,” mused Carmen. “Plus, you know, I’ve heard Luisa give you a hard time for your handwriting.”

“Yes, that’s certainly a continuing topic of discussion in the office,” admitted Ben. “But it’s so important to capture every detail. Medical professionals have it drilled into their heads that if we don’t write it down, it didn’t happen.”

“Sounds just a bit like our inventory process at the pizzeria,” said Carmen. “Every tidbit of food that gets pulled out of the freezer or off the shelves has to be recorded. I have to know how much we use of everything and how quickly, or else I may not reorder in time. If we don’t have the ingredients customers want, they may never return—and they



certainly won't refer us to their friends and family."

"Luisa and I were talking about that today," said Ben. "The less time we spend on patient notes, the more time we can spend on patient interactions and care. Happy and healthy patients are going to be much more likely to refer us to others."

Carmen nodded. "Plus, my bookkeeper needs to track my inventory costs in exquisite detail, or else we might be in trouble if there's ever an audit," he continued. "So even though I grumble about what a pain it is to manage and report on our inventory, I make sure to dedicate enough time to the process to do it right."

"You know, our Genesis coach, Charlie, has warned us that every practice that has been in business for more than five years will likely be audited by a state board or insurance regulatory agency," said

Ben. "It's been a while since our last audit—we really need to do better with our documentation. We need to be able to have notes that are both fast and compliant with state, federal and insurance rules."

"You know what we really need to do better with?" asked Carmen. "Preparing dinner, or else Jonathan might grow weak with hunger!"

Ben laughed and opened the refrigerator to get out the salad fixings. But he knew he'd be thinking more about this issue in the coming days.

*What are Dr. Ben's options to simplify the patient notes process while enabling him to remain in 100% compliance with state, federal and insurance rules?*

## The Java Blues

Dr. Ben parked in the only available space in the bustling parking lot, grabbed his keys, got out of the car and practically ran to the front door

of the coffee shop. With things so busy in his practice and at home, he felt like he was perpetually running behind. He hoped his friend Steven hadn't been waiting long.

"Hey, Ben!" he heard from across the room. Ben smiled and walked toward Steven's table. The two had so much in common—Steven was a partner in a practice across town. He was looking forward to catching up with his friend.

"How have you been, Steven?" Ben asked. "I know it's been a few months but things have been so busy. Sorry for losing touch!"

"No worries, Ben," Steven said, giving his friend a firm handshake. "I've been busy too but things have never been better!"

"Tell me all about it," Ben encouraged. "I could use some happy news."

"We made some big changes in the office—we had been going around and around about whether or not to invest in that software that helps us to manage the practice but we finally dove in," Steven said. "It was intimidating at first but it has made a huge difference in our operations."

Ben sat back and stared at Steven with renewed respect. He and his friend had talked many times about Genesis, but he never thought Steven would be the first

to go all in. “Tell me all about it,” Ben said.

“You and I have always complained about how documentation is so tedious and takes away time from patient interactions,” said Steven. “Plus data entry mistakes can be so costly—whether they hold up insurance reimbursements or take away from patient care because we don’t follow up on missed appointments. What put us over the edge was our poor performance on our recent audit.”

Ben nodded, knowing what was coming, since he and Luisa had been talking about this just last week.

“We made it through our audit relatively unscathed but one area the auditors pointed out needed drastic improvement was our patient notes,” Ben admitted. “We’d all rather just scribble notes and stuff them into files so that we can maximize our time with our patients, but that never works out well. I’m pretty good at documenting patient visits and conversations but I haven’t always documented in ways that are compliant with state, federal and insurance rules. We got ticked pretty good on that. I made a vow that we’d change things for the better and gave our Genesis coach a call the next day, after the audit was over.”

“So how are things working out with your new system?” asked Ben.



“I couldn’t be happier—in fact, everyone seems to be enjoying things more,” Steven said. “We have become more efficient and accurate in documenting patient notes. Not just the SOAP notes but also getting in the related images, forms, test results and verification of benefits that are required to give the proper overview of care. All of us—from reception to treatment room—are now able to spend more time with our patients and ensure a great experience.”

“Best of all,” Steven continued, “I know our patients are happier, too. This month we saw a 10 percent increase in referrals. Our investment in the Genesis software is going to pay off in no time.”

“That does it, you’ve talked me into it,” said Ben. “Tomorrow I will call Charlie, our Genesis coach. Today, the coffees are on me!”

*Dr. Ben is finally ready to take the plunge and start using Genesis to help with documentation. So what is the next step?*

## Right at Your Fingertips

“So did you finally get to see your friend, Steven?” asked Luisa on Thursday morning.

“Yes, I did—we’ve both been so busy for the last few months and it was great to have a chance to catch up,” said Dr. Ben. “In fact, he told me about the new software they’re using at his practice. It’s helping them with their patient notes in particular—the entry is fast and accurate, and the system lets them know if there are any problems or areas of concern with the patient’s record.”

Luisa regarded Ben hopefully. “So I expect you’ll be making a phone call to our good friend Charlie today?” she

asked. Charlie was their Genesis coach.

"You bet I will be," said Ben. "Right after I get my coffee!"

A few minutes later, Ben called Charlie and, after some small talk, they settled down to business. Charlie directed Ben to the test system, and after giving his screen a quick glance, Ben was ready to learn more.

"So my friend Steven was raving about how his office has managed to cut down on their time entering patient notes all while increasing their accuracy," Ben said. "I'd like to see how this might work for us."

"Of course, Ben, I'll be happy to take you through it," Charlie said. "To begin, I'd like to emphasize that our system takes all the facets of patient care and enables you to see it just as you would look at your patients. Just as you wouldn't just only one symptom of a complex medical condition, we wouldn't want your practice to see just one part of your patient's record at a time. You can treat a patient most successfully if you can see his or her care plan, visit notes, appointments made and/or missed, where in the insurance cycle the patient is ...with Genesis, you can really have every detail at your fingertips."

"That certainly sounds good—can you show me around a bit?"

"Of course—let's have a look around the Travel Card!" Charlie said. "First, you can see a column of patient visits down the left side. You know what's really cool? Missed appointments are marked in red and that's extremely valuable information to have at a glance."

"Have you ever had a patient who completely flummoxed you? Perhaps they're not getting better, or maybe they're getting worse—and you're starting to think that maybe it's your fault?" continued Charlie. "Well, if you were using Genesis, you'd see easily that, perhaps, this patient was missing one or two appointments each week, or month. Maybe you don't realize it because you've got a lot of patients and because memory management doesn't always kick in until there's an issue."

"Sure, with our patient load I don't always know how often a patient is supposed to be coming to see me," admitted Ben. "If I don't have an easy way to see if they're showing up or not, I won't know if they're getting the care I think they need."

"Right! Now look at the bottom left-hand side of the screen. There's a button you click when you need to add a picture or file," Charlie said. "Now look at the top for the billable codes: ICDs on the left—we recommend that method if you use XMR notes to enter a diagnosis using the assessment tab—and CPTs on the right."

"Well that seems pretty straightforward," said Ben.

"It sure is! If you're not going to use XMR notes, you just have to go to the diagnosis tab, select the area on the left and then choose the diagnosis code you need. Same for procedures—select the area or type on the left, and the procedure code from the right."

"Mmm hmm," Ben said. He was surprised how easy this was to follow. He had expected to be more intimidated.

"Now when you bill, if there are any issues, you'll get a message in red and a pop-up alerting you to possible problem, maybe with validation, or perhaps the service date is out of the care plan date range," Charlie said. "We even color code the billing section so that you'll know if you're in the insurance phase, cash phase or if the visit is free."

"But is there a place where I can enter notes that are for my own purposes?" asked Ben. "What if I have a conversation with my patient that I don't need to document for insurance purposes—I just want to make sure I have important information readily available?"

"If you look to the right of the screen, you'll see rectangular boxes—we call them 'sticky notes,'" said Charlie.

"They're like Post-It Notes where you can document reminders for yourself, personal information the patient shared with you or perhaps even

some thoughts for the next phase of the patient's care."

"This is incredible," said Ben. "By having all of this information right at my fingertips I feel like I could really maximize my time with my patients and much less time in the system."

"That's the whole point," said Charlie. "By connecting all facets of a patient's care, scheduling, billing, personal notations, history... all of that is critical to ensuring that patient gets the best care possible."

"Well let's not waste any more time," said Ben. "We're ready to put your system to work for us!"

*Dr. Ben is ready to launch his next Genesis adventure!*

## What Would You Do?

*Some advice from the Genesis community*

Doing the work twice is not efficient and it allows room for more errors. The best option would be for Dr. Ben to do his documentation during the visit. With Genesis that is exactly how the system is setup. That way no one is wasting time transcribing or documenting at a later date were details aren't as fresh.

—Heather Miller

Using the most up to date software can and will make documenting patient visits fast and efficient. The Genesis documentation software does just that.

—Tim Helfinstine

Dr. Ben could be entering his notes himself with a few typed words and a few clicks on buttons rather than having Carmen do it for him. Genesis documentation would free up time for both of them and they could concentrate on keeping their patients happy.

—George Konold

Dr. Ben and Luisa have not tracked their documentation time, so they do not realize how much time they are losing. If D.Ben spends

5 minutes writing and Luisa spends 5 minutes typing it, they are losing 10 minutes a patient. If they see 200 patients a week, they are losing a combined total of over 33 hours a week. With their current process, how can Dr. Ben be sure each visit is documented? Implementing a full practice management solution that includes an electronic medical record would not only reduce the documentation time, but include automation/accountability to ensure each visit is documented.

—Michelle Corrigan

As a coach at Vericle Inc., I hear providers tell me their first priority is helping patients and wanting to increase the time they have with patients, but now they have to document everything in great details in order to stay compliant and/or to get paid which can be very time consuming. Vericle is a electronic system that helps a practice with workflow and accountability, always striving to improve features

to streamline process for practices, the documentation platform continues to be improved upon to assist providers to minimize their documentation time allowing provider to spend more time with patients. —Robin Kortman

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