

## PRODUCT REVIEW

# Automated management system boosts efficiency

**John Morgan** explains how an internet-based practice management system is helping consultants' businesses

AS A SMALL but growing company, we are always looking at how we can make our business more efficient. Having used ePractice manager (an automated practice management system) for the last six months, we believe we have found just what we have been searching for.

The ePractice manager system has a number of useful features. These include the ability to generate and print standard letters, receipts, invoices and statements, batch print documents, enter bulk payments, enter patient alerts and notes and set up and manage patient identifiers.

As the person responsible for managing the accounts for our clients, I find the invoicing and associated reporting particularly helpful.

Self-funding patients account for approximately 30% of our total invoices. Doing these on the computer was simple enough but time-consuming. Once patient details have been loaded onto the system, ePractice manager produces a well-presented invoice with the minimum amount of data input. The document template allows a certain amount of personalisation with the facility to edit the default wording and layout.

Insurance companies, even those not yet geared up to electronic billing, are listed on ePractice manager and the address comes up on the invoice with a simple search. This facility is useful, since the names of many of the smaller insurance companies can be unfamiliar.

One of the major benefits of ePractice manager is the ability to

send invoices electronically, which saves a huge amount of time and expense. The system actually prevents you from sending incomplete invoices.

If you have ever forgotten to put a vital piece of information on an invoice, this feature will be particularly appealing, as it helps prevent invoice queries. With all relevant information included, you know the invoice will be dealt with speedily. But if you do not have all the information, the invoice can be saved as a draft until you can get hold of it. The draft invoice is flagged so you cannot forget to complete and send it.

## Time reduction

With 50 to 60% of all our invoices sent electronically, savings in postage and stationery mount up. And we have certainly noticed a big reduction in the time it takes insurers to settle outstanding accounts – good for our clients' cash-flow.

One aspect of the system open to improvement is the way 'write offs' are handled; for example, when a self-funded invoice is raised when the patient is insured – or vice versa. Currently, you have to remember to delete these invoices manually to prevent them from being included in the totals.

Accepting payments and issuing receipts on ePractice manager is straightforward. I particularly like the bulk payment facility which means larger insurer statements can be quickly reconciled.

Since I do the banking and keep a paper record of all cheques banked, I find the end-of-day banking report is most useful. It



A member of the Jenny Morgan Secretariat operating ePractice manager

can be in PDF or Excel format, depending on your preference.

Aged debtors will always be a problem, so ePractice manager's automated chase-ups are appreciated. You can choose your own parameters, but 30, 60 and 90-day reminders are preloaded as templates and you can use your own wording.

There are good reporting facilities for month-end and for tracking of invoices and payments.

Aged debtors can be listed by payer – helpful when chasing insurers for money. Having got through on the phone (I often spend more time getting through than talking), you have a list of queries to work through and can quickly go through the patient's details without having to refer to a paper file.

A word of caution here, though. To get the best of the reports you

really do need good Excel skills. Without these, you could have problems, especially if you need totals using the treatment/consultation date and not the date the invoice was raised. This could be compounded when consultants have clinics at different hospitals and you wish to separate the business done at each place of work.

Overall, ePractice manager has a lot to offer. It is inexpensive, relatively easy to use, versatile and backed by good support from the customer service desk team.

■ More information on ePractice manager is available at the website [www.healthcode.co.uk](http://www.healthcode.co.uk), or phone 01784 263150.

*John Morgan is accounts director of The Jenny Morgan Secretariat, which manages the medical accounts for 14 specialists and is based in Folkestone, Kent*