Office Support Staff

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ABSTRACT

The pace at which we live and practice in this new century leaves little time to manage many of the menial tasks of day-to-day survival. This is especially true in the field of medicine. With today's insurance policies and procedures, Health Information Privacy Protection Act (HIPPA) regulations, and the low return of payment for time invested, it is crucial to have a supportive group of people around you to help make your valuable time as meaningful as possible. This article will describe an arrangement of ancillary office staff for a colorectal practice. There will be detailed information on job descriptions, expectations, and level of training required for each. Upon completion of this article, one should be able to identify the personnel needed to establish and manage an efficient office from the front desk to the billing department and ultimately the practice manager.

KEYWORDS: Ancillary staff, policies and procedures, job description

Objectives: On completion of this article, the reader should have an understanding of the office staff associated with a colorectal surgery practice.

A complete cast of employees or support staff dedicated to you and the services you provide is crucial in establishing and maintaining a successful colorectal practice. This article will provide the basic arrangement of a typical colon and rectal private practice containing one to six physicians. Some references will be made to an academic or clinical setting that may differ slightly. Upon completion of this portion of the text you will know the essential employee staffing needs and be able to list their individual qualifications to run an efficient office. Also, suggestions for additional staffing will be available for you to consider as your practice grows.

FRONT OFFICE

The front office staff is usually the initial contact for your patients. This may be by way of phone, mail, e-mail, or face to face. Therefore, it is important for this person to have good interpersonal skills and be able to multitask

with the computer and busy phone systems. The minimum education level is a college degree or a high school graduate with extra medical and computer training. Usually one person can effectively manage up to two physicians. Making appointments, answering phones, filing, chart generation and upkeep as well as collecting money and some basic accounting skills are the main concerns of the front office staff. Another important part of this job is having thorough knowledge of major insurance or third-party payers to handle referrals in a timely fashion. It is important to have referrals and verification of insurance coverage in place so as not to waste time in the office waiting for paperwork to arrive. It is best for your productivity and busy schedule to have these mundane issues resolved before the patients arrive, and this often falls into the hands of the front office staff. Also, one important, intangible quality that the front office staff should possess is the ability to have patients seen in a timely fashion while making them feel welcome

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and letting them know you are glad they have chosen you and your practice for their care.

BACK OFFICE

Many medical practices refer to the patient exam rooms, laboratory, and work area as the “back office” and this is the area where most patient care is provided. The skill level for this position is a medical assistant (MA) or preferably an LPN or RN. Some states offer certification for the MA position which may assist in your hiring decisions. Once he or she is hired, the back office employee is best utilized if he or she can work with the same doctor consistently, and this is usually the case in a clinic or academic setting. However, in a busy private practice with different physicians rotating through different offices, this one-on-one arrangement is not usually physically possible.

There will be some crossover work required in which the front and back office staff will need to work together, for instance, answering the phone and addressing patient questions and concerns about medications, complications, and follow-up appointments, or obtaining X-ray or laboratory reports from hospitals or other physicians. But the main goal of the back office staff is to facilitate the doctor in examining and treating the patients. Not only are they expected to measure vital signs but they also must be adept at using instruments such as anosopes, flexible sigmoidoscopes, and rubber band ligators. And they should know how to clean them according to OSHA (Occupational Safety Hazards Administration) standards while keeping them in good working order.

One nurse can effectively assist two and perhaps three doctors in one office. This can easily be achieved if the physician can see same-sex patients (i.e., male MD seeing male patients without a chaperone, and female MD seeing female patients). But, again, the primary responsibility of the back office nurse is to move patients into the exam rooms efficiently, have all the information needed that day in the chart, make the patient feel as comfortable as possible, and assist the doctor through the exam as adeptly as possible.

SURGERY SCHEDULER

This title seems self-explanatory but a few caveats should be discussed. Since your reputation is ultimately based on your surgical results, the operations you perform should run as smoothly and seamlessly as possible. And the operation begins the day of surgery before the patient ever enters the operating room. It is the scheduler who has control over initiating this event.

Any person with a high school degree can perform this job. However, good communication skills and a sympathetic heart are a must. Calling the operating

room scheduler and posting the case is simple enough to do. Once this is done, then the patient is contacted, and as you know patients only retain about 30% of what the physician tells them. Compound this with the many preoperative instructions that are required for colorectal surgery or colonoscopy (bowel prep, time of arrival, NPO, etc.) and it can be a cauldron of problems. This is where a compassionate and thorough person can make a very important day run more smoothly by starting it properly. This is the role of the surgery scheduler. If you have someone dedicated to this, your reputation and ultimately your practice will benefit.

CLINICAL MANAGER

As your office staff and practice grow the management responsibilities will grow with them, and new levels of employees will be required. The clinical manager is primarily responsible for the nursing staff. He or she should therefore have some nursing background with at least an LPN or RN level of training. In many situations this person evolves through the practice, having been the primary back office person in the smaller practice setting and then taking on the management position as more nurses are hired as the practice grows.

In the colorectal setting this person should have extensive knowledge of the instrumentation and scopes to train new personnel in the cleaning and maintenance of the equipment. A clinical manager should be able to hire, train, and manage the back office staff. Also, he or she is responsible for stocking the offices with the supplies needed to run the back office. Some examples are the detergents needed to clean the scopes, needles, syringes, and local anesthetics. And in a similar context, the clinical manager should see that all offices, the work areas, and the employees are meeting standard OSHA guidelines. This includes establishing a system for having accurate documentation that these standards are being met and maintained, especially during times of office personnel turnover. If there is more than one office, then weekly site visits should be performed by the clinical manager at each office.

And finally, one of the most important duties of this position is establishing and maintaining an accurate tracking system of patient phone calls and complaints as well as insuring that patients' test results are provided to them efficiently, accurately, and privately according to HIPPA guidelines.

BILLING DEPARTMENT/MANAGER

You have invested many years in learning how to take care of your patients. Now it is time to take care of yourself and your accounts receivable is your lifeline. Therefore it is important that you personally have a working knowledge of your practice's billing and

collecting. This begins with the proper diagnosis and billing codes which will be covered in greater detail in a later article. But, with that foundation in place, timely reimbursement is more easily achieved. You can then pass these responsibilities on to a billing manager. This position requires a greater level of training with preferably a college degree with some medical knowledge and good communication skills. Also, a certification in coding skills is strongly encouraged (but not required) and certification classes are widely available.

The day-to-day operation of the billing person can be individualized but essentially proceeds as follows. Payments from insurance companies are tallied daily which involves posting physical or electronic reimbursements. Then follow-up with denied or rejected claims is evaluated and calls to the insurance companies and patients are made to collect these outstanding payments. This involves a great deal of phone time with patient education and appeals with the insurance provider. Some appeals for payment involve written appellations or electronic form completion. The billing person's most important priority is addressing the most current claims in the accounts receivable because there are limitations on filing or appealing claims which, if left unaddressed for more than 3 to 6 months, will be unable to be collected and must be written off. All of this demonstrates that a dedicated, persistent individual with good organizational and communication skills is tantamount in your billing manager.

HUMAN RESOURCES

With your accounts receivable in place and money in the bank, it's time to pay your staff for all their hard work. This is where the human resources (HR) manager enters the fray. The skill set for this job requires a college degree (ideally an HR degree) with a concentration in management. The expectations for this position are management of payroll and insurance benefits of the employees as well as IRS deductions and W-2 forms. HR maintains employee files, which should include a track record of grievances and complaints that are reviewed and re-evaluated annually at minimum. HR also maintains policy and procedure manuals, insuring that all new employees have had a chance to review these prior to their beginning employment. The HR manager should be present for board meetings to review staffing issues and reveal any grievances or problems that may need action by the physicians.

Other tasks can be given to the HR employee, given the setting. In many cases, this person will assume the role of a personal assistant to the doctors and will be asked to schedule meetings and make travel arrangements (flight itinerary, hotel reservations, etc.) to keep this type of information centralized for accounting and tax purposes.

PRACTICE ADMINISTRATOR/OFFICE MANAGER

Requirements for a practice administrator or office manager should be evaluated carefully. While everyone in the practice is important, whom you choose to lead the practice will influence and provide direction to your practice and is essentially the keystone of any successful group.

A manager should have a bachelor's degree in management or healthcare administration. It would be helpful to have an individual with at least 3 to 5 years of experience in private practice. This person should have strong leadership qualities and be highly motivated, organized, and able to multitask. With these qualities he or she will be able to perform the functions of a manager that include but are not limited to overseeing the other managers; representing your practice through public relations; administration of accounts receivable and billing; and monitoring practice finances.

Management of your staff is an ongoing challenge. Three areas of staff management will be discussed in this article: performance evaluations, efficiency and effectiveness of staff, and team building.

Performance evaluations are vitally important to staff development and success. A manager must set clear expectations for all employees. These expectations should be well documented and communicated to the employee. The documentation should be in writing and the employee should sign off on the expectations for the personnel file. A manager will have to recognize when an employee is not meeting the practice expectations. It is the responsibility of the manager, and not the physicians, to correct and help develop the performance of the employee throughout the year. From personal experience in this setting, it is best to let the managers manage the employees and let the physicians treat the patients. At the employee's anniversary date, the manager should review the employee's file and set new goals and expectations for the upcoming year.

Evaluation of the efficiency and effectiveness of the staff is the second function of a manager. A manager must be able to monitor time management and patient flow. To do this, you must monitor the amount of time spent working with each patient. This includes the time the patient first calls the practice to the time the patient leaves the office. Collecting as much information as possible before the patient enters the office is important to the flow of the office time. Once a manager has made the office efficient, it will maximize the doctor's time and productivity, which allows for more patients to be seen.

Next, a manager should promote team building. There are several ways to do this, but one of the most important is frequent communication of positive reinforcement. A manager must be able to recognize when the practice morale is low and correct the situation

swiftly. A positive staff that promotes your practice provides the best public relations.

With the rise in competition, public relations has become very important. While referring physicians will remain the number one source of patients, it is important that a manager find different avenues to generate new business. Some areas that your practice should consider are web sites, mailings, and presentation of the office and staff. The manager must evaluate the demographics that the practice is trying to capture and design a marketing program to reach these individuals.

A large part of a manager's job is the financial control of the practice. With the decline of reimbursement, financial monitoring and control of all expenses have become more important. A manager should be able to prepare a yearly budget. In preparation of a budget all vendor contracts (cell phones, office supplies, dictation service, lawyer fees, consultants, etc.) should be reviewed on a yearly basis. This will give the manager the opportunity to renegotiate contracts, which will reduce costs. Another important financial responsibility of the manager is implementing and monitoring financial controls. A manager will need to develop a system to monitor all monies to assure all are accounted for. A checks and balances system must be in place to ensure financial stability.

Finally, a manager should have a very solid foundation in accounts receivables and billing. A manager's main function is to have several systems in place to monitor the timeliness of collections, adjustments, and write-offs and that rate contracts are being paid to be sure that no charges are being lost. Continuing education is important in this area. Rules and regulations are constantly changing and to maximize reimbursement you must be up-to-date on the most current information. With all of this responsibility resting on the practice administrator, it is easy to see that it is a critical piece of the "practice puzzle," and finding a good candidate may take some time.

CONCLUSION

Described above is the basic design for a successful colorectal private practice. Although not all of the positions may be needed initially in a young practice, it is hoped that they can be added as the group grows and develops. Describing the positions needed is simple enough, but filling them with good people can be a frustrating process of trial and error.

However, with these individuals in place, you will be able to manage your time more effectively and devote more of your energy to taking care of patients, which will ultimately allow your practice to flourish.