

A woman with long brown hair, wearing a yellow top, is sitting at a white desk in a bright office. She is smiling and looking towards the camera. In front of her are two computer monitors. She has her right hand on a mouse. To the left, a keyboard is partially visible. The background shows large windows with a view of a city skyline.

The EHR “Need To Know” Symposium

THE COMPREHENSIVE
TECHNOLOGY SOLUTIONS SYMPOSIUM
FOR EYE CARE PROFESSIONALS

OUR MISSION

The purpose of this program is to provide you with the knowledge and tools to take your practice to next level as it relates to technology. Regardless if you are still an office that doesn't have an office or are already close to the "paperless" technology integrated office you will gain valuable insight from this symposium on the "next step."

AGENDA

- HOUR 1
 - REALITIES OF THIS COURSE
 - WHAT YOU NEED
 - WHY EHR
 - ESTABLISH A BASELINE
 - YOUR ROI & OTHER FINANCIAL IMPLICATIONS
- HOUR 2
 - NEEDS ANALYSIS
 - PRODUCT SELECTION
 - ACQUISITION PLANNING
 - IT CONSULTANTS
- HOUR 3
 - IMPLEMENTATION
 - INTEGRATIONS
- HOUR 4
 - UTILIZATION OF YOUR INVESTMENT
 - Q&A

WEB SOLUTIONS

For more information and downloads of valuable practice resources please visit [Www.ots-consultants.com/](http://www.ots-consultants.com/)

OUR SPEAKER



Scot, a nationally renowned educator on ocular surface disease, technology, and practice management is a featured international speaker and educator on various subjects and his enthusiasm for teaching shows through. He also has multiple publications, both professional journal articles and books to his credit. He directs an ophthalmic consulting service, Morris Education & Consulting Associates, as well as Ocular Technology Solutions, Inc. He is a member of the American Optometric Association, The Colorado Optometric Association, and the American Academy of Optometry. He is an associate editor for *Optometric Management* and writes a monthly technology column “Tech Time” in *Optometric Management*.

He received his doctorate of optometry at Indiana University in 1996. He completed a residency in ocular disease and refractive surgery at Triad Eye Medical Center in Tulsa, OK. He then served as the cornea and refractive clinical director of Discover Vision Centers in Kansas City for 5 years before moving to Colorado in 2002. He worked at a refractive surgery practice in Denver for 2 years before buying a private practice, Eye Consultants of Colorado in 2004.

In 2008 he started Ocular Technology Solutions (OTS) as an extension of his consulting business to help optometrists use technology to maintain their competitive edge by streamlining their business and preventing costly mistakes. Better business through technology integration and implementation. OTS provides a wide array of services including acquisition, planning, technology integration, and comprehensive implementation of electronic health records (EHR), diagnostic technology, inventory management and much, much more.

He is also a deeply rooted family man. He lives in the mountains of Colorado with his wife Kelly and two sons, Drew and Aiden. He is an avid hunter, outdoorsman, and hiker. He also coaches many of his sons’ sports teams and enjoys traveling with his family.



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THE FIRST STEP: ESTABLISH A BASELINE

Before we start in the general course we need to spend a few minutes looking at the reason that you need to consider acquiring and implementing EHR and other technologies into your practice. We will look at the fundamental truths (and myths) about EHR and other operational technologies.

Why should you go EHR...or should you?

Getting an Illinois Baseline

Why You Need HER

The Realities

The Rationale

The Resistance

How Technology will Effect your Practice

The operational reasons

The legal reasons

The financial reasons

Keys to Remember

1. _____
2. _____
3. _____
4. _____
5. _____

Action List

1. _____
2. _____
3. _____
4. _____
5. _____

STEP 2: PUTTING THINGS IN PERSPECTIVE

Now that we have examined where your baseline is we need to put in perspective some other common truths and myths about EHR including what the stimulus package and related government mandates really mean. We also perform a comprehensive evaluation of the “True” costs and savings of your technology investment to determine a virtual ROI of taking the technology plunge.

The truths and myths of EHR

Costs

Hardware

Software

Peripherals

Lost Patient Time

Savings

Efficiencies

Hard Costs

Intangibles

Taking Advantage of the Possibilities

The Stimulus Money

E-prescribing

Keys to Remember

1. _____
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Action List

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STEP 3: WORKFLOW AND NEEDS ANALYSIS

You can not determine where you want to go unless you know where you are now. This part of the series will identify the fundamental questions that each practice needs to ask before selecting ANY technology. We will analyze workflow of a traditional eye care office and provide tools that any office can use to determine where they are now. Then we will analyze the potential needs and wants of the practice.

Understand you Practice

Workflow Analysis: The Step by Step Process to Positive Productivity

Understand Your Needs & Wants

Needs analysis

Key Questions

The Checklist that will Change your Perspective

Keys to Remember

1. _____
2. _____
3. _____
4. _____
5. _____

Action List

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STEP 4: TECHNOLOGY PRODUCT SELECTION

Now that you have decided what you where you are, what you need and who is going to help it is time to select the perfect technology for the office. This module will deal with the 4 parts of the process: Software, Hardware, Peripherals and IT help (we will cover this in the next section)

The Understanding the Selection Process

Your Checklist

Software

Electronic Health Records

Security

Hardware

Servers

Workstations

Routers

Connectivity

Storage

Peripherals

Document Management

Accounts Payable Solutions

Accounts Receivable Solutions

Printers

Human Resource Tools

Business Intelligence Solutions

Keys to Remember

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STEP 5: TECHNOLOGY ACQUISITION & IT HELP

So now that you have a list of what you want—how do you get it. There are thousands of sellers, resellers and people who understand absolutely nothing about your business.

Where to Acquire Your Technology

Your Vendors

What to Look For

The “Be Wary Words”

Hardware

Software

Peripherals

Your Checklist

Recommended Resources

IT Assistance

What to Look for in an IT Consultant

Your Checklist

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STEP 6: IMPLEMENTATION

The transition to the technology integrated practice will also have a large impact on you, your staff, and your patients. Successful implementation involves not only choosing the right technology solution but the affects everyone on your office including doctors, administration, staff, and patients. Successful implementation is of utmost importance and will greatly eases the challenges and anxiety of both you and your staff. This course will describe the actions you need to take as well as timetables, training guides, and protocols to make this process easier.

Pre-Implementation

Planning

Managing the Change

Set expectations

The personality

The process

Diagnostic Integrations

Training

The Approach

The Order

System Set-up

Data Conversion

Implementation

Planning

Practice Procedure sheets (Routing Forms)

Training Protocols & Plans

Data Conversion

Managing Flow

Department by Department Protocols

Post-implementation

Keys to Remember

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2. _____
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STEP 7: INTEGRATION

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STEP 8: TECHNOLOGY UTILIZATION TIPS

Not that you have selected your technology, acquired and implemented it—what do you do with it. We will explore the best ways to utilize your technology including potential pitfalls and pre-emptive solutions.

Avoiding Common Pitfalls

Tackling Technophobia

Patient Phobias & Problems

When it doesn't work as planned

Re-training

Document Management dilemmas

Re-examining Workflow

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YOUR SUMMARY



Keys to Remember

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Action List

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3. _____
4. _____
5. _____

YOUR CLASS WORKSHEET

- A. Average patient Exams per day/dr _____
- B. Clinic Hours per week _____ x 50 _____
- C. TE OD's in office _____
- D. FTE Staff Members in the office _____ x 4000 = _____ Average annual staff hrs
- E. A. x 2 _____ charts per day
- F. E x 3 x 15/60 x 250 _____ Ave annual staff cost to keep charts
- G. A x 3.71 x 250 x 3yrs _____ cost to keep paper charts over 3 yr
- H. A x 34.16 x 250 _____ Cost to see patients in Paper office
- I. A x 19.37 x 250 _____ Cost to see patient in HER office