PRACTICE MANAGEMENT SOFTWARE SYSTEM (PMS)
PHYSICIAN PRACTICE NEEDS ASSESSMENT

The Mid-America Coalition on Health Care in collaboration with practice management software vendors, practice Managers and other key experts have developed a practical tool for you to assess and determine your current practice management software needs. It is recommended you complete the following questionnaire and share the information with prospective practice management software vendors. You may need to add additional questions or issues on a separate piece of paper depending on your specific system. This tool is not designed to be electronic medical record needs assessment.

Chief Complaint
Why do we feel the need to analyze our current PMS system? Is it because our current system has one or more of the following: (Circle all that apply)
1. Inadequate support and training
2. Lack of innovative features
3. Vendor sold or changed
4. Other software incompatibility
5. Interoperability
6. Prefer one vendor for EMR and PMS because current vendor only has one solution
7. Physician interest
8. Other: _______________________________________________________

Function 1: Patient Registration
The following questions will assist you with assessing a PMS patient registration functions.

<table>
<thead>
<tr>
<th>Can the PMS system capture or perform the following patient registration functions?</th>
<th>YES</th>
<th>NO</th>
<th>Don't Know</th>
<th>Level of Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Basic Features</strong></td>
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<td></td>
<td>H=High L=Low</td>
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<tr>
<td>1. Patient demographics,</td>
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<tr>
<td>(e.g. Can it print a patient face sheet)</td>
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<td>2. Patient contact information</td>
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<td>(e.g. Cell phone, email, pagers 10 digit dialing)</td>
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<td>3. The insured name</td>
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<td>4. Responsible party</td>
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<td>5. Emergency contact information</td>
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<td>6. Payor/ insurance information</td>
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<tr>
<td><strong>Mid-Level Features</strong></td>
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<tr>
<td>1. Customization of data entry workflow</td>
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<td>(e.g. User personalization to streamline transaction processing)</td>
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<td>2. Patient ID card/insurance card imaging</td>
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<tr>
<td>a. Scanning</td>
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<td>b. Store and retrieval</td>
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<td>3. Does your PMS allow for customized fields for data capture</td>
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<tr>
<td><strong>Advance Features</strong></td>
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<tr>
<td>1. Patient self-registration</td>
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<td>2. Family and social history online</td>
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<td>3. Capable of date sensitive timelines</td>
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<tr>
<td>a. (e.g. health plan changes, co pays and referrals)</td>
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</tbody>
</table>

Important thoughts or questions to ask:_____________________________________________
**Function 2: Scheduling**
The following questions will assist you with assessing the efficiency of the PMS scheduling functions.

<table>
<thead>
<tr>
<th>Does the PMS have a scheduling component? (If no, skip to next section Function 3: Billing)</th>
<th>YES</th>
<th>NO</th>
<th>Don't Know</th>
<th>Level of Importance</th>
</tr>
</thead>
</table>

Can the PMS complete the following scheduling functions:

**Basic Features**
1. Ability to schedule patient appointment with limited information (e.g. patient account number, name, DOB and telephone)

2. Permit simultaneous user access

3. Ability to customize patient “alert notes”

4. Capable of displaying patient financial obligations

5. Ability to print patient schedule

6. Ability to pre-print patient super bill/encounter form

**Mid-Level Features**
7. Ability to change scheduling view by:
   - Day at a glance
   - Week at a glance
   - Month at a glance
   - By Physician

8. Ability to find first appointment availability by:
   - Appointment
   - Physician
   - Location
   - Date and time
   - Visit type

9. Customize scheduling system by provider (e.g. 15 min versus 10 min time slots)

10. Ability to view patient information while scheduling (e.g. health plan name, co-insurance, reason for visit)

**Advance Features**
11. Capable of electronic verification of insurance eligibility
    - By “real time”
    - By batch

12. Ability for physicians to access patient schedule via the web

*Important thoughts or questions to ask: ________________________________
__________________________
__________________________
__________________________
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### Function 3: Billing
The following questions will assist you with assessing the efficiency of the PMS billing functions.

<table>
<thead>
<tr>
<th>Can the PMS complete the following billing functions?</th>
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<tbody>
<tr>
<td><strong>YES</strong></td>
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<tr>
<td>H=High</td>
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</tbody>
</table>

#### Basic Features

1. Capture procedure and/or visit charge data
2. Capture demographic data (e.g. Edit demographic data at time of charge entry.)
3. Complete accounts receivable activities (e.g. Posting of personal and insurance payments.)
4. Complete line-item posting for multiple procedural codes
5. Complete primary claim filing
6. Complete secondary claim filing
7. Complete tertiary claim filings
8. Complete contract or fee schedule reconciling
9. Generate patient billing statements
   - Are they patient friendly
   - Can they be exportable to a third party

#### Mid-Level Features

1. Complete pre-editing and/or "scrubbing" of claims
2. Perform HIPAA compliant EDI transactions:
   - 270 (eligibility inquiry) and 271 (eligibility response) transactions
   - 276 (claims inquiry) and 277 (claims response) transactions
   - 835 electronic remittance advice (ERA) transactions (e.g. Can your system post ERA's with major insurance carriers?)
3. Generate patient collections correspondence
4. Manage patient collections through automation
5. Capture national practitioner identifier (NPI) information

#### Advance Features

1. Perform customized coding per health plan

**Clearinghouse vendors - For more information to access an assessment tool refer to the end of this document.**

**Important thoughts or questions to ask:**
____________________________________________________________________________________________
____________________________________________________________________________________________

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### Function 4: Reporting and Analysis
The following questions will assist you with assessing the efficiency of the PMS reporting and analysis functions.

<table>
<thead>
<tr>
<th>Can the PMS complete the following <strong>Analysis</strong> functions?</th>
<th>YES</th>
<th>NO</th>
<th>Don't Know</th>
<th>Level of Importance</th>
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</thead>
<tbody>
<tr>
<td><strong>Basic Features</strong></td>
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<tr>
<td>1. Import pre-loaded data (e.g. contract fees and fee schedules) from another source to the software program</td>
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<tr>
<td><strong>Advance Features</strong></td>
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<tr>
<td>2. Complete data mining/drill down analysis of PMS data?</td>
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<tr>
<td>♦ If yes, do you get the data you want?</td>
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<td>♦ If no, can the data be exported to another database?</td>
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</table>

Can the PMS system perform the following **Reporting** functions?

<table>
<thead>
<tr>
<th>Can the PMS system perform the following <strong>Reporting</strong> functions?</th>
<th>YES</th>
<th>NO</th>
<th>Don't Know</th>
<th>Level of Importance</th>
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<tbody>
<tr>
<td><strong>Basic Features</strong></td>
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<tr>
<td>1. Daily scheduling</td>
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<tr>
<td>2. A standards set of embedded reports</td>
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<tr>
<td><strong>Mid-Level Features</strong></td>
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<tr>
<td>1. Capable of building customized reports</td>
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<tr>
<td>a. Physicians (hospital census and schedule of patients)</td>
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<tr>
<td>b. Practice Managers</td>
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<tr>
<td>c. Billing personnel</td>
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<tr>
<td>d. Marketing personnel</td>
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</table>

**Important thoughts or questions to ask:**

- ____________________________________________________________________________
- ____________________________________________________________________________

**Other Functions**

<table>
<thead>
<tr>
<th>Does the PMS have the following additional features</th>
<th>YES</th>
<th>NO</th>
<th>Don't Know</th>
<th>Level of Importance</th>
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<tbody>
<tr>
<td><strong>Basic Features</strong></td>
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<tr>
<td>Interoperability HL 7</td>
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<tr>
<td>1. Interface with other systems</td>
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<td>2. If yes, who supports the interface?</td>
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<tr>
<td><strong>Education</strong></td>
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<tr>
<td>1. A user manual embedded in the software program</td>
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<td>2. Help windows or “pop-up” screens</td>
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<td>3. A demo database for experimentation and practice</td>
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</table>
### Server
1. Do you operate from a network server?
2. Does it have at least a Windows based operating system?  
   If no, what operating system does it run on? 
   ________________  
   If yes, is it at least Windows 2000 or higher? 

### PC Workstation
1. Do you operate from a “dumb terminal”?
2. Do you operate from a local PC desktop?
3. Is a “professional version” of Windows 2000 or higher

### External Peripherals
1. Do we have adequate external peripherals to support a PMS?
2. Printers
3. Scanner
4. Servers
5. Personal computers

### Other
1. Do we currently have known incompatibilities with other software programs that might conflict with normal operations or impact the selection process for a new PMS?
2. Do you have an IT person on staff or outside consultant to assist us?

**Important thoughts or questions to ask:**

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**Current PMS Satisfaction**

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
<th>Don't Know</th>
<th>Level of Importance H=High</th>
<th>L=Low</th>
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</table>

1. Offers local qualified support for hardware
2. Has available a toll free number
3. Has an acceptable response time
4. Has post-purchase training:  
   a. On-site  
   b. Phone  
   c. Web-based
5. Did we receive adequate training on the PMS
6. Provided timely software updates

**Important thoughts or questions to ask:**

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**Other Key Questions**

1. What is your current budget for considering a new PMS (software, hardware and training)?
   a. $< 20,000
   b. $20,000 - $40,000
   c. $40,000 - $60,000
   d. $> 60,000

2. What is your budget for annual support?

3. How do you plan to finance the purchase of a new PMS?
   a. Leasing
   b. Financing
   c. Purchase

4. What is your timeline for “going live” on a new PMS?
   a. $< 6 months
   b. 1 year
   c. 18 months
   d. 2 years
   e. Specific date & month:______________ year:___________________

**Other resources:**

1. **Doctors Office Quality Information Technology effort (DOQ-IT)** at [www.doqit.org](http://www.doqit.org)
   HHS-supported HIT initiative to increase the use of electronic health records and patient registries.

2. **EMR evaluation guide** (California HealthCare Foundation)

3. **Physician Questions to Ask Your Electronic Claims Clearinghouse** go to [www.gkemma.org](http://www.gkemma.org)