

CHOOSING PRACTICE MANAGEMENT SOFTWARE

By Andrew Schox and Airlie Waller

Thinking of purchasing Practice Management Software? Our Technology Section Editor Andrew Schox and Airlie Waller offer the following tips.

Making the jump (or moving) to a new Practice Management Software (PMS) is a big deal. PMS can be rightly regarded as the centrepiece of running your practice. It's going to be what you and your team use most frequently on a daily basis. It will contain a lot of critical information about your patients and your business. For these reasons, you really need to try and pick the best solution for you. This article walks you through what you should be thinking about before you take this step.

Where to begin? If you are new to this, then a good start is to look around at what's on offer. Google is your friend here, but also ask colleagues and look at publications like this one. As you become familiar with what's out there, you can make a list of features that you like in order of priority.

Alternatively, you may have been using a PMS for some time, and already have an idea of what you like and don't like. Presumably you also have a reason to consider a move to another product. Remember that software can evolve rapidly, so even if you are familiar with some of the major players in this market, you should always go back and see what's new and what's different this time around.

Things to consider

Here are some of the issues you should think about as you evaluate your options. You should try and end up with an opinion (or at least a preference) in each of these areas.

#1 Specific requirements

Wherever you are coming from, you may have certain requirements that are deal

breakers for you. Now is a good time to get those down on your list. Some examples include:

- You have to use a certain piece of hardware such as a HICAPS terminal and an iPad
- Medicare/DVA integration requirements
- Email/SMS reminders

#2 Features

Common features of PMS include:

- Appointment book and online bookings
- Invoicing (including via email)
- Online payments
- Integration with other software (accounting, Medicare, marketing and so forth)
- Patient notes
- Letters (including templates)
- Messaging/recalls/reminders either via email and/or SMS
- eHealth integration
- Import existing paper documents
- Reports/analysis
- Migration support.

#3 Bring your own device

Some offices use Macs, whereas some like Windows. You may want to use tablets. Being able to access your system on a smartphone is very useful indeed, even if you mostly use a computer at work. Lots of systems now run on web apps in your browser. Check to see which browsers are supported.

#4 Look and feel

Practice Management Software should be easy on the eyes, easy to use and quick to pick up. If it's not nice to look at, and clunky to use, then people will not

enjoy using it. Also, you want the data in your system to be accurate and reliable: well-designed software deliberately tries to make your life easier and helps you work more efficiently.

#5 Hosting: your office or the cloud?

A common view is that, "I want to keep my data in my own office as it is more secure". In fact, it is almost never the case that data hosted in your private network is likely to be more secure than if it is hosted in the cloud.

We will talk about security and privacy in more detail in an upcoming article. But for now, assume that professionally-hosted, cloud-based solutions are going to be as secure as you can get.

#6 Importing and exporting your data

Even if you are starting from scratch, you might want to move elsewhere later on, so you need to be able to access all your data when you need to. Some companies will offer a minimal export (or claim that it's not possible). This can encourage a 'vendor lock-in' where it all seems too hard to look elsewhere. Don't get yourself stuck in a product forever.

#7 Integration with other software

The most obvious example here is integration with your accounting software, but there are lots of opportunities to automate and integrate your business by using software that can talk to other software and exchange information. Even if you don't do this right now, you should have that option down the track.

#8 Cost

Practice Management Software comes at different price points, and sometimes the difference in price isn't sufficient

to influence a decision between one product and another. It is up to you what you are prepared to pay, but doing things with software is always going to be cheaper and more effective than doing it manually. It is better to pay a premium if you can see that the company behind the software is doing a great job, cares about and supports its users, and is likely to be a good partner for you in the long term.

The final decision

Hopefully by this stage you will be confident that you are interested in only one or two options. This is where you need to try and get a real feel for the software. Consider doing the following:

- Read reviews and watch videos
- Sign up for a demo if one is available.

Look at what's available as far as online communities and support services. Interact with these. Call up support and ask a dumb question, and see how you are treated.

Is there a public roadmap for the future of the software? Can you see it? Vote on it?

Get everybody in the practice who is going to use it to try it out. See what their impressions are.

Once you have made your decision, there will be some planning, training and transition to consider. You want everybody to hit the ground running with the new software with the minimum of down time. If someone is going to help you with data migration, you will need to plan this too.

It's in your hands

Choosing a new PMS is not something you do on the spur of the moment after seeing an ad on Instagram! You need to take some time to think through your needs, and then pick the best option, based on what most fits the bill. You need to consider this as part of the overall strategy for your business and

the technology you use in it, since your PMS is a central source of information which will be likely to be used by other tools you integrate with. Once you have made your decision (especially if this involves migrating a lot of data from another system), it's not something you want to change your mind about in a hurry.

Next steps

- Start by making a list of what is essential, desirable or just nice to have.
- Carefully go through each product that you are evaluating. Maybe make a table or spreadsheet for this, so it's set out and you can see the big picture.
- Talk to colleagues, read reviews, and play with any software demos on offer. Make sure you are thinking of your current needs as well as how you see your business evolving over the next few years.
- Good luck!

ASK THE EXPERTS

Q What do you envision for the future of practice management software, and how it may impact on podiatrists in particular?

A "Health practices must enable the hyper-convenience mode of living! As lives get busier and more mobile, people want smarter ways of maximising their time. During the pandemic many podiatry practices used the downtime to evolve and keep up with changing patient expectations. Moving from a paper-dependent practice to electronic health records with self-service online tools was a transformative step, and practitioners can now exchange information in real time making sure everyone has a current and accurate file.

"Software automation tools make running a health practice easier, and provide a fuss-free experience for the patient. And isn't that what we practitioners strive to do?"

powerdiary.com

Damien Adler,
Co-Founder of Power Diary
powerdiary.com/stride

PracSuite
The professional cloud option

Tony Taddeo – Managing Director of Smartsoft – developers of Front Desk and PracSuite | Vice President of Medical Software Industry Association
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