

Ride the Wave and Utilize Remote Services

In the past, doctors and team members have asked my thoughts regarding remote technology and outsourcing insurance billing to third party companies. In thinking about it, businesses have been referring out certain front office tasks for years, and it has become extremely cost effective in many ways. Huge example is Trojan Professional Services. For decades they have been collecting money and giving dental practices up to the minute insurance information and breakdowns, that otherwise would be time consuming in the office. More and more practices are relying on outsourced services for billing and benefit checks than ever before.

That said, I have gathered information, and listened to both pros and cons from providers, virtual assistants, and business owners. Following is a check list of the tips I have prepared from those queries.

- **First and foremost, have the virtual office assistant sign a Business Associate's Agreement (BAA) for HIPAA compliance.** Make sure that the BAA includes all parties working on your account within the company. Also have a copy of that BAA in your HIPAA binder at front desk.
- **Check references or ask for a resume.** If you are hiring a company, look at the reviews online. Ask around to see what other practices are saying about remote services. If hiring an individual, ask for a resume.
- **Confirm that what you pay the VA or company is not more than what you would pay a front office team member for the same duties or job description. *Please note:*** The VA is an extension of the front desk. Try to instill the same personnel policies and job descriptions as if they were there, in person. Before outsourcing, check to see if the task or tasks can be given to another staff member.
- **Some companies charge hourly, while some charge per task, and others are paid a percentage.** This is a great question when comparing services. Some companies are paid a percentage of what is collected by the VA, incentivizing the work on your behalf. When paid hourly, some of the tasks that are tedious or time consuming can be completed in less time, with fewer distractions. If paid hourly, have the VA clock in and out of your practice management software. However payment is made needs to be in direct correlation with the task or tasks you want completed.
- **It is beneficial to have the VA meet with the team or schedule weekly phone conferences with office manager.** Some companies will have the VA visit the office annually, and have that person participate in all front office functions for a period of time. Others will have the VA participate in team meetings via Skype, or some other video platform. This gives that individual an opportunity to experience the work environment first hand and communicate in person.
- **Since you are making certain your work is completed daily, find out what time zone your VA is operating from.** This is important so the office knows when to expect work to be completed, IE: when can you expect end of day reports and billing to be finished; by the next morning or that evening? This is significant information for the bookkeeper or accountant, as well.

- **Verify that the VA has a separate folder on the practice desktop or furnishes a dedicated computer work station in your office.** The VA needs to be able to remote into the office computer daily or when a question comes up. If that means there should be a dedicated computer work station make sure the VA can access necessary practice data in order to effectively do the job. Do not create extra work for the team by having them perform any unnecessary scanning of documents. All front office team members and VAs need to properly coordinate duties in order to make more efficient use of their time.
- **One of the pros of remote services is that your VA does not get involved in the personal aspects or politics of the practice.** The VA can also become an unbiased form of checks and balances when reviewing and analyzing end of day, end of month, and end of year reports.
- **As a way of keeping control, all payments and EOBs need to come directly to the office and be posted immediately.** Do not give the posting of payments or adjustments to the VA. This is one task that should not be outsourced for any reason, because a physical deposit should be handed to doctor at the end of each day.
- **All documentation entered in computer by VA, needs to be formatted properly with attention to detail, correct jargon, and initials.** Abbreviations are accepted as long as the entire team knows what those shortcuts mean. It is recommended that the VA enter all notes in a different color font for proper clarification.

There are many reasons why a doctor finds it necessary to outsource certain tasks. Some providers will hire remote billers while their front office is in transition. Or maybe the insurance department is behind. For whatever reason, do some homework, and make sure that hiring a virtual assistant is enhancing and accelerating the process of attaining your bottom line. Do not let the outsourcing of front office functions become a crutch or an unnecessary luxury. Remember, outsourcing anything in the practice allows the front office to focus on patient care, marketing, and promote higher case acceptance.