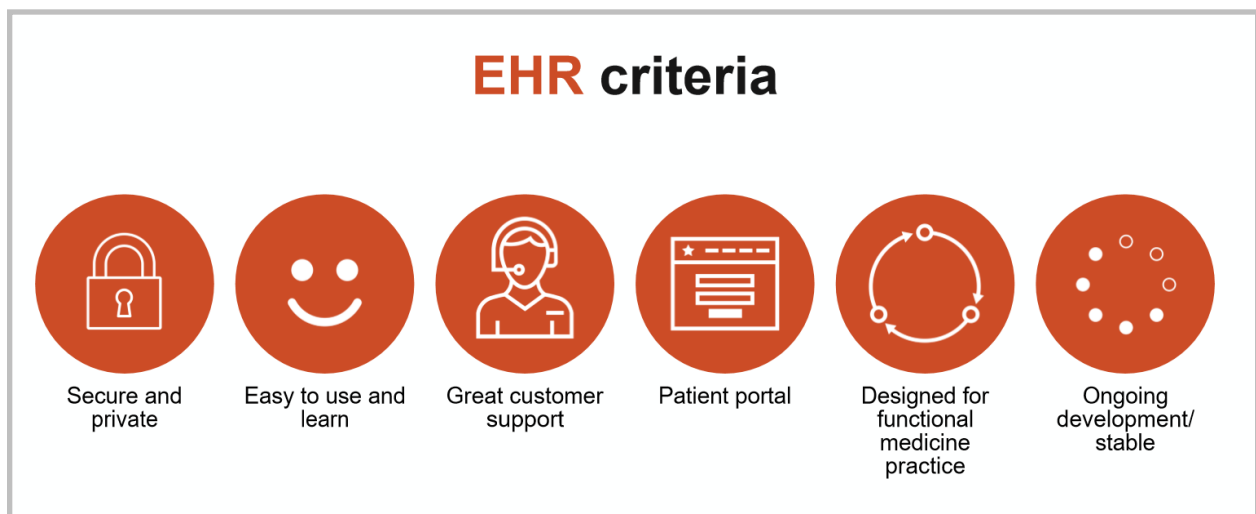


EHR and Accounting Overview

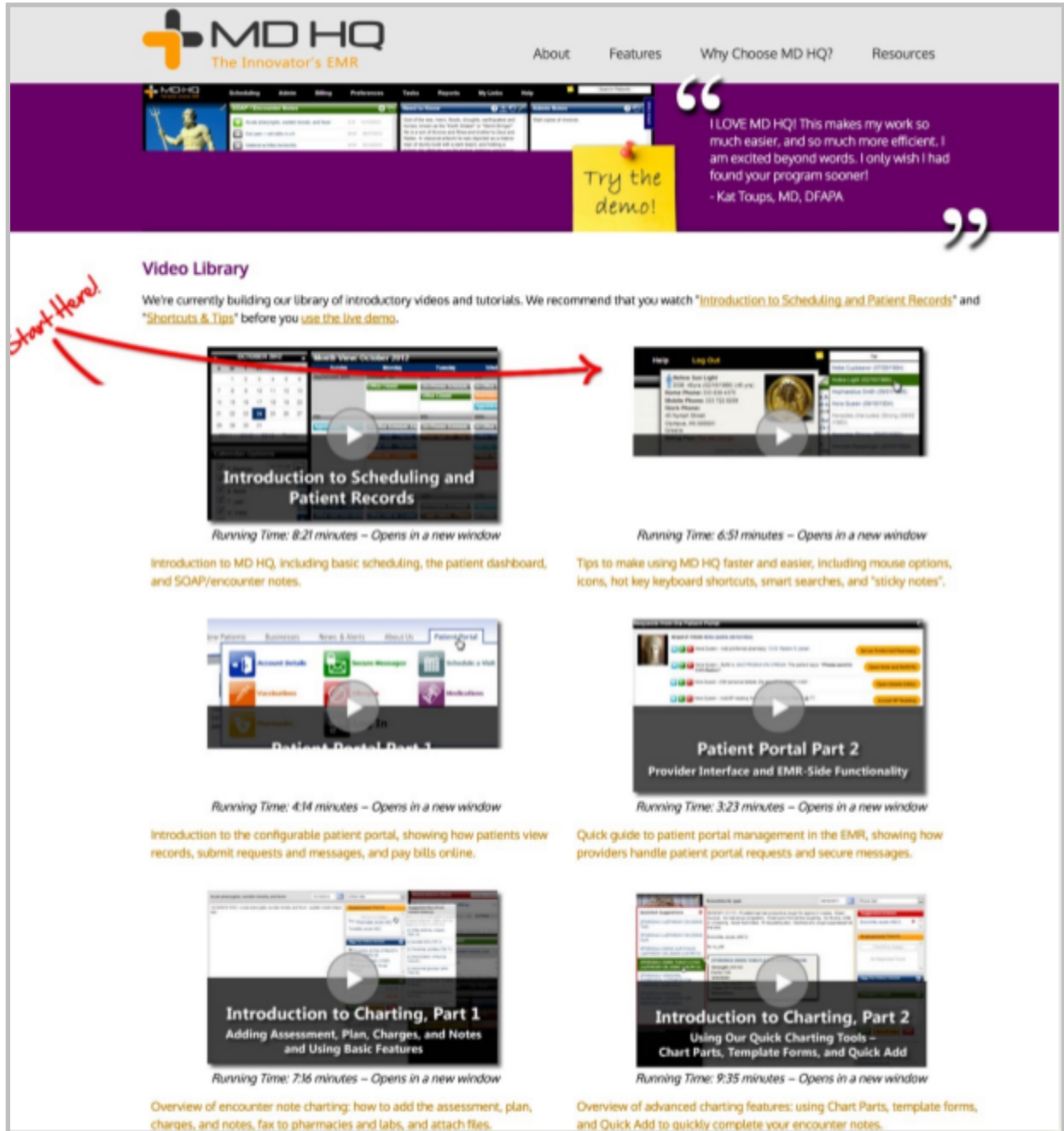
Hey, everybody. In this presentation, I'm going to give you an introduction to EHR software and accounting, and then we're going to have some much more specific videos for you from my staff on how to use these systems in a functional medicine practice.

Choosing an EHR and accounting system is crucial for the success of your business. There are a lot of options and considerations for each, and I'm, again, going to give you just a basic intro, let you know what we use and why, and then turn it over to my staff for more detailed demos and how-to.



The criteria for a good EHR should be that it's secure and private, it's easy to use and learn, and it has great customer support. It has a patient portal that allows access to labs, scheduling, and messaging the clinician. It's specifically designed for a functional medicine practice, and it is in ongoing development and is stable.

I've used no fewer than six EHRs over the years and have finally settled on MD HQ. I'm extremely happy with it. We were one of their earliest customers, and our feedback has helped to shape its development. The owner of MD HQ has been very responsive and has collaborated with us on adding new features and refining it for functional medicine. Our patients love it, and so do all of the clinicians, and it's really a pleasure to use, especially compared to other EHR systems that we used in the past.



MD HQ
The Innovator's EMR

About Features Why Choose MD HQ? Resources

“ I LOVE MD HQ! This makes my work so much easier, and so much more efficient. I am excited beyond words. I only wish I had found your program sooner!
- Kat Toups, MD, DFAPA **”**

Try the demo!

Start Here!

Video Library

We're currently building our library of introductory videos and tutorials. We recommend that you watch "Introduction to Scheduling and Patient Records" and "Shortcuts & Tips" before you use the live demo.

Introduction to Scheduling and Patient Records
Running Time: 8:21 minutes – Opens in a new window
Introduction to MD HQ, including basic scheduling, the patient dashboard, and SOAP/encounter notes.

Shortcuts & Tips
Running Time: 6:57 minutes – Opens in a new window
Tips to make using MD HQ faster and easier, including mouse options, icons, hot key keyboard shortcuts, smart searches, and "sticky notes".

Patient Portal Part 1
Running Time: 4:14 minutes – Opens in a new window
Introduction to the configurable patient portal, showing how patients view records, submit requests and messages, and pay bills online.

Patient Portal Part 2
Running Time: 3:23 minutes – Opens in a new window
Quick guide to patient portal management in the EMR, showing how providers handle patient portal requests and secure messages.

Introduction to Charting, Part 1
Running Time: 7:16 minutes – Opens in a new window
Overview of encounter note charting: how to add the assessment, plan, charges, and notes, fax to pharmacies and labs, and attach files.

Introduction to Charting, Part 2
Running Time: 9:35 minutes – Opens in a new window
Overview of advanced charting features: using Chart Parts, template forms, and Quick Add to quickly complete your encounter notes.

MD HQ has some great introductory videos on its website, and I do recommend watching them. We've recorded much more detailed demos on how we use MD HQ in our practice that we're going to deliver to you. You've already seen some of these earlier in the practice management unit, but we're going to include those again this week, and we're also going to continue to deliver them in the weeks to come.

Accounting software criteria



Cloud/web-based platform



Mac and PC desktop apps / iOS and Android mobile apps



Easy to use and learn



Large expert community

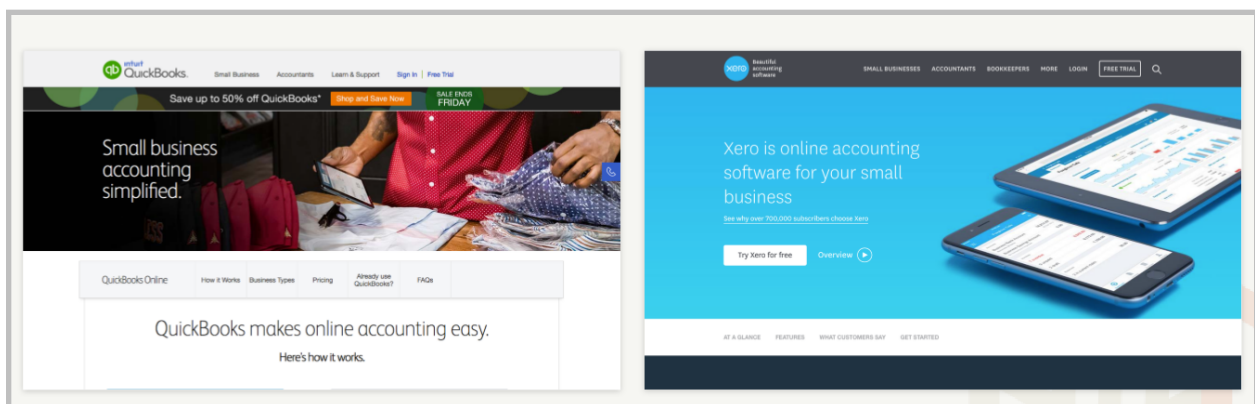


Apps/plugins to extend functionality



Compatible with modern merchant/payroll solutions

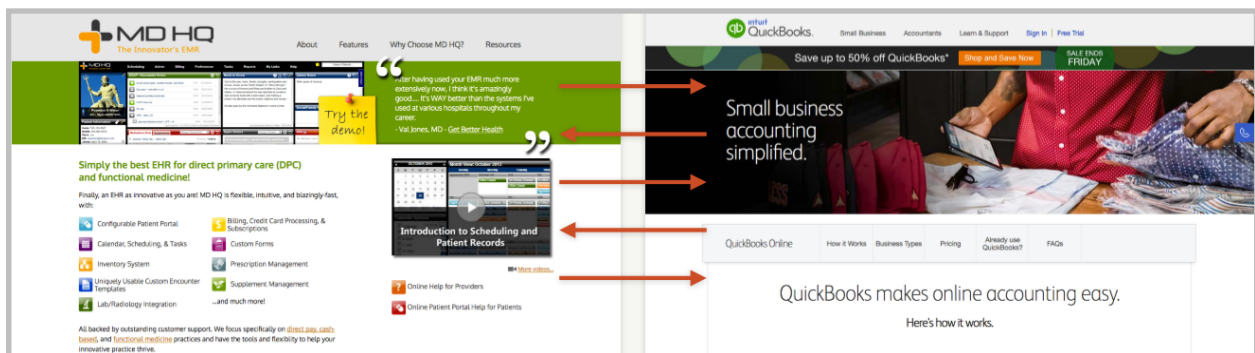
Choosing good accounting and bookkeeping software is also important. You want to automate as much of this as possible and make it efficient so you're not spending your valuable time or at least too much of it doing this kind of thing. The criteria for good accounting software are that it should have a strong web-based interface. This is definitely the future of accounting software, and it's not really worth considering one that doesn't have this. It should have Mac and PC desktop apps, because while cloud and web access are important, it's not the fastest way typically to make entries. It should also have good mobile apps for mobile access. It should be easy to use and learn. This is perhaps the most important criteria. It should have a very large community of bookkeepers and accountants who are trained in it. It should have apps and plug-ins to extend its functionality, and it should be compatible with modern payroll and merchant processing systems.



The two main options out there that fit all these criteria are QuickBooks Online and Xero. They are often compared, and they are quite comparable. One is not necessarily better. Each has its pros and cons. Xero has more power-user capabilities than QuickBooks Online. It's more open and customizable, whereas QuickBooks Online has its own payment processing payroll and book-to-

tax integrations. Of course, the downside there is that QuickBooks Online forces you to use its payment processing solution, which is more expensive and not as feature-rich as other solutions out there.

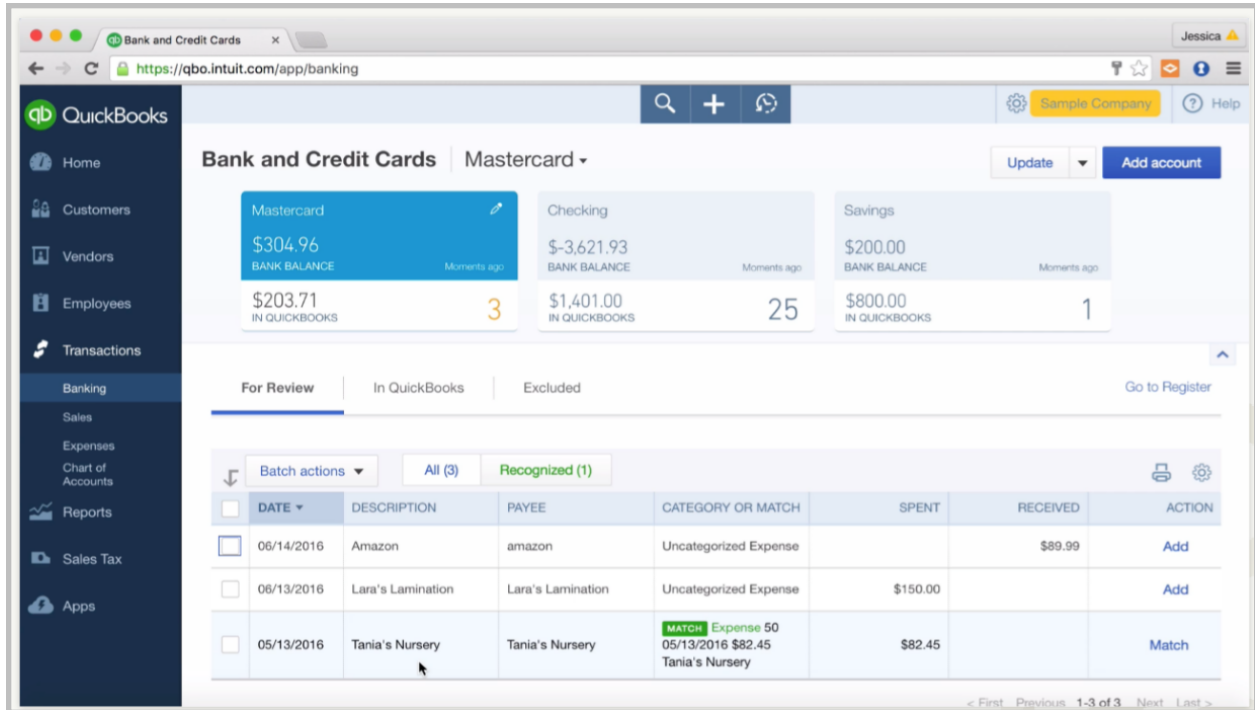
We chose QuickBooks Online years ago before Xero was really comparable to QuickBooks Online. If we were choosing today, I could go either way. You may choose Xero just because it's more open, extensible, and has more power-user capabilities and a little more flexibility with the payment processing, but I don't think those differences are big enough to warrant a change if you're already using QuickBooks Online. We've continued to use QuickBooks Online for that reason. I don't think you can really go wrong with either, so I think at the end of the day, it boils down to personal preference and possibly location.



A quick word on QuickBooks Online and MD HQ integration. In short, there isn't any, at least out of the box. The good news is I don't think it's necessary. You can use MD HQ with Stripe to process payments for appointments, labs, and supplements or prescriptions, which is what we do, and the total amounts will still be downloaded from your bank account into QuickBooks Online. If you need to generate a report of revenue by class, in other words, such as what clinician generated how much revenue or by category, as in how much revenue did you get from initial consults versus case reviews or by type, how much did you make from supplements versus labs, MD HQ has all of those reports. You can also export a daily report of transactions that you could then upload into QuickBooks Online if you want to do that.

Earlier on, we processed all payments in QuickBooks Online and didn't use MD HQ's billing features, but that proved unwieldy and difficult, and then there were some issues with the security of storing credit cards, etc., so it's better, I think, to use MD HQ's billing and then just generate a report that you can upload into QuickBooks Online, if possible.

The other thing is that Stripe's payment processing feature set is much richer than Intuit's. It has a lot of really great features, especially if you're doing any kind of recurring billing. They're useful. It's just a better solution overall, and when you use QuickBooks Online, you're not able to use Stripe. You're tied to using the Intuit payment processing solution.



Okay, so now for the demos. I had our financial manager, Jessica Mishra, who is also an advanced QuickBooks Online ProAdvisor, record a series of demos introducing you to QuickBooks Online and, in particular, how we use it in our practice. For MD HQ, start with the videos on its website, and then we've already delivered videos so far on how to process patient charts. Coming up, we'll have videos on onboarding, setting up a new patient, scheduling appointments, responding to patient messages both from admin staff and clinicians, and ordering labs and supplements.

Okay, that's it for now. I hope you enjoy the videos and find them to be useful. Of course, let us know if you have any questions in the Q&A.