

# Staffing – Part Two

## The **3 Most Important** Positions



**Bookkeeper**



**Practice Manager**



**Health Coach**

So when you're first starting out, the three most important positions to hire, in my opinion, are a bookkeeper, a practice manager, and a health coach. Let's start with the bookkeeper.

This person will keep your finances in order and free up your time to focus on what you should be doing as the clinician, treating patients, improving your skills, and running the clinic.. A bookkeeper is often not a major expense when you are first starting out, maybe a few hours a week, and it is well worth it, in my opinion. You are looking for integrity, trustworthiness since they will often have access to financial accounts and other sensitive information, attention to detail, organization, and experience with new accounting and bookkeeping tools such as Quickbooks Online. In fact, QuickBooks Online has a marketplace where you can find QuickBooks certified bookkeepers, so that is a good place to look if you are using QuickBooks Online and Zero, which is another accounting system also has a similar marketplace.

organized and experienced with, like I said, the newer accounting and bookkeeping tools. Later on, I'm going to teach you a process that we use that is really effective for screening applicants, for weeding people out that don't meet these basic requirements.

# The **Practice Manager**



Crucial back-end admin functions

Creating systems

Ordering labs & supplements

Setting up accounts with vendors

Managing the EHR

Billing supervision

The practice manager handles all of the crucial back-end administrative functions of a practice. These include creating systems, ordering labs and supplements, setting up accounts with vendors, managing the EHR, and billing along with the bookkeeper. They will also field all communication from patients initially. As you grow, you will likely want to hire patient navigators who focus on this role specifically and have the practice manager focus on admin and operations, but when you are starting out, a good practice manager should be able to do all of it. They need to be extremely detail oriented, organized, and structured, and it is very helpful if they have prior experience working in a medical practice.

## The Health Coach



- Another layer of support
- Help with implementing protocols
- Diet, lifestyle, behavior change
- Leading classes and groups
- Answering questions in EHR

The health coach can have several roles. At the simplest level, the coach holds the patient's hand through the process and provides another layer of support and can serve as a liaison between the patient and you as the clinician. The coach can support clients in implementing complex protocols, provide more intensive diet, lifestyle, and behavior support than you as the clinician has time to do. A coach can also lead classes and groups both for existing patients and for the general public in order to attract new patients and answer questions in the EHR.

A coach should be certified by a legitimate health coaching program, one that covers core coaching skills such as motivational interviewing, strengths, stage of change, and so on and not just one that trains coaches to tell people what diet to follow. You can look for coaches who are certified by the International Consortium of Health and Wellness Coaches, or ICHWC. As you may know, I also have a training program for coaches, the ADAPT Health Coach Training Program. Coaches from this program will share the same philosophical and practical framework that you are being trained in in this program, and that is one of the main reasons I created it, of course, is to realize this vision that I have of collaborative practice model where all of the different providers in the clinic or who are working together share the same foundation or a similar foundation and approach to treatment. You can check the directory at [kresserinstitute.com](http://kresserinstitute.com) for coaches who have been trained in this framework. At the time of this recording, we are about halfway through the first cohort at the end of 2018, so they will not be ready until June 2019. If you are listening to this later, then we will already have graduates listed at the Kresser Institute directory.

We are also planning a forum for both the practitioner and health coaching training program graduates, in-person conferences, and some kind of matching service to help practitioners and coaches link up.

## Independent Contractors



Graphic designer

Developer/IT support

Business attorney

Healthcare attorney

Tax preparation / CPA

HR person

In addition to these three core staff positions, there are a range of part-time independent contractors who may eventually become employees who you will likely need help with. These are the areas that you should consider. One would be a graphic designer to help with designing your brand identity, business cards, your website, and all that sort of stuff.

Another would be a developer and IT support person. This would be someone who would do the backend development for the website, help you with any IT issues that you have, setting up staff with email addresses, and maybe someone who could get to know MDHQ very well and help you with it, help support you with any other software platforms that you are using.

A business attorney is really important. This is someone who can help you with incorporation, incorporating your business, any questions that you have about hiring staff, people, or employees, drawing up contracts for your independent contractors and employees, answering any questions that you have related to business issues. It is really good to have someone like that on your team. A healthcare attorney can also be really important as this is someone who can help you with your documentation such as your informed consent, arbitration agreements, documentation related to insurance, billing, and so on.

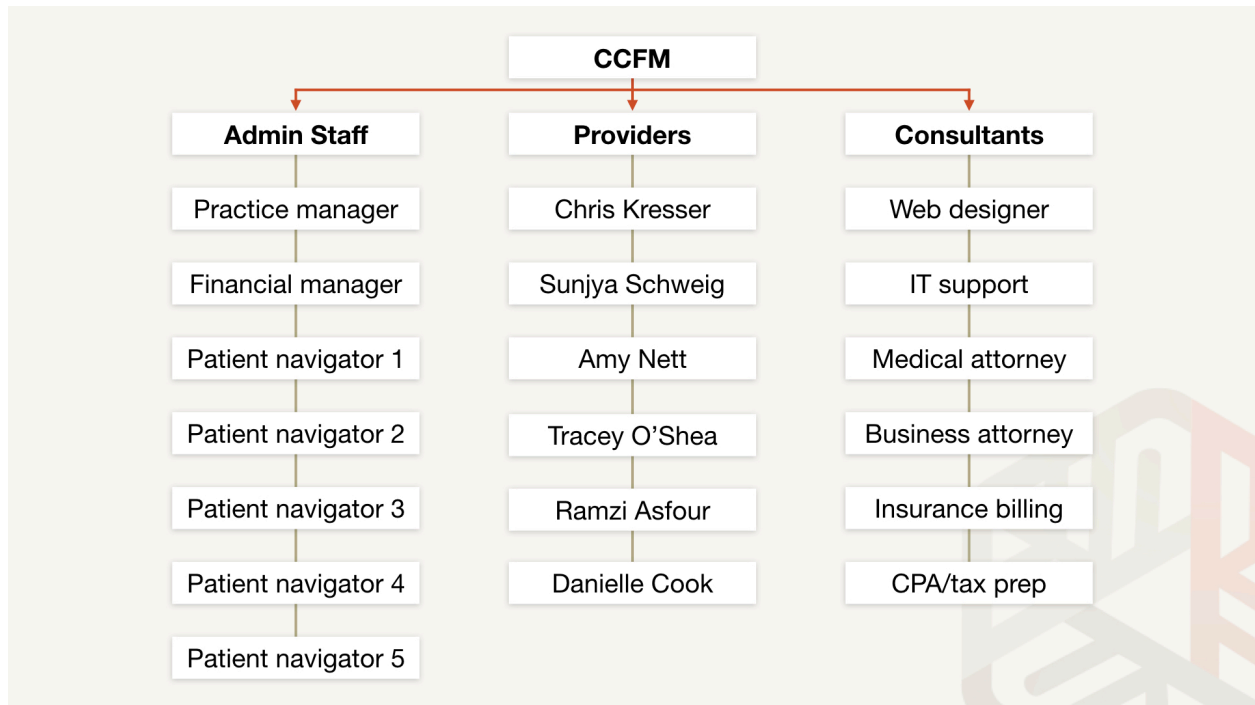
On the attorney front, obviously attorneys can be really expensive. I did this early on. There were some groups such as Rocket Lawyer now where you can pay a subscription fee, and you get access to attorneys for a lot less than you would if you were paying an hourly rate for an attorney. I had some success with that, but ultimately, I decided just to take the leap and establish a relationship with a business attorney and a healthcare attorney so that I could get to know them and just feel confident with their ability and skill. That has turned out really well. I am glad that I did that, but I didn't do it right away. Initially, I was working with attorneys through

Rocket Lawyer, a group like that. I can't actually remember exactly which one, but there are a couple of options.

I'm providing you with a lot of forms that we have that have already been vetted by business and healthcare attorneys. Of course, you will need to check in your own state because the regulations are different, and I would recommend you hire an attorney to maybe review the forms that you are planning to use and make sure that they work for you in your particular situation with your scope of practice and your license, but hopefully the forms that we provide can at least offer a template and save you some time and money.

Of course, you will want a tax prep person and eventually a CPA. Initially, it's probably not necessary to have a CPA. You will just need someone to prepare your taxes, but as you grow in scale, you will definitely want to have a CPA who you can consult with on some of the bigger strategic questions.

Finally, you will need an HR, human resources person when you get to a certain size and scale. For the first few years, we didn't have an HR person. We had mostly independent contractors and didn't have a lot of HR type of issues that we needed that kind of support. Now that we have 13 or 14 people working in the clinic, and many of them are employees, there is just a lot of stuff that comes up that I don't want to have to deal with, frankly. It is just tremendously time consuming, and I want to focus my energy on patient care, content production, and research, so we do have an HR person, not a full-time person but a part-time person on staff to help manage all these issues, and it is really, really helpful.



Here is an organization chart of our current staff at California Center for Functional Medicine, or CCFM. As you can see, we have six providers, five clinicians and one registered dietitian and health coach, so me, Dr. Sunjya Schweig, Dr. Amy Nett, Tracey O'Shea who is a nurse practitioner, Dr. Ramzi Asfour, and Danielle Cook, who is a health coach. Then we have a practice manager. We have a financial manager. We actually have more than five patient navigators at this point. I think we're up to eight or nine given the volume of patients and the number of clinicians we have. Just as part-time contractors, we have web designer, IT support, medical attorney, business attorney, an insurance billing specialist, and a CPA and tax prep consultancy firm that we work with. Obviously, when you are just starting out, you won't have this setup. You may just have yourself as a single provider, a practice manager, and a health coach, as I recommend, and then some of the part-time contractors for legal and IT support.



This slide just describes the different roles that patient administrators and navigators play. We crosstrain each patient navigator in each of these roles so that they can cover for each other when someone goes on vacation, they get sick, or something comes up. It also helps to avoid burnout and provides some variety in their daily work. Having said that, we do have patient navigators/administrators specialize in one or more role depending on their capability and temperament. For example, we have people who are just excellent with patient communication, and they are really specialists with patient portal, which we call PPQ administration. They answer a lot of the incoming patient questions, and we have assigned them to each clinician so that patients get to know the person who answers the questions for their particular clinician. We have some people who are really, really good at onboarding new patients, so they specialize more in that. We have a person who loves setting up procedures and systems who specializes in that, but they are all crosstrained, and they can do all the roles when necessary.

Okay. That's it for this section. In the next section, we are going to talk much more about onboarding new patients, all the steps you go through to carry that out successfully. Talk to you then.