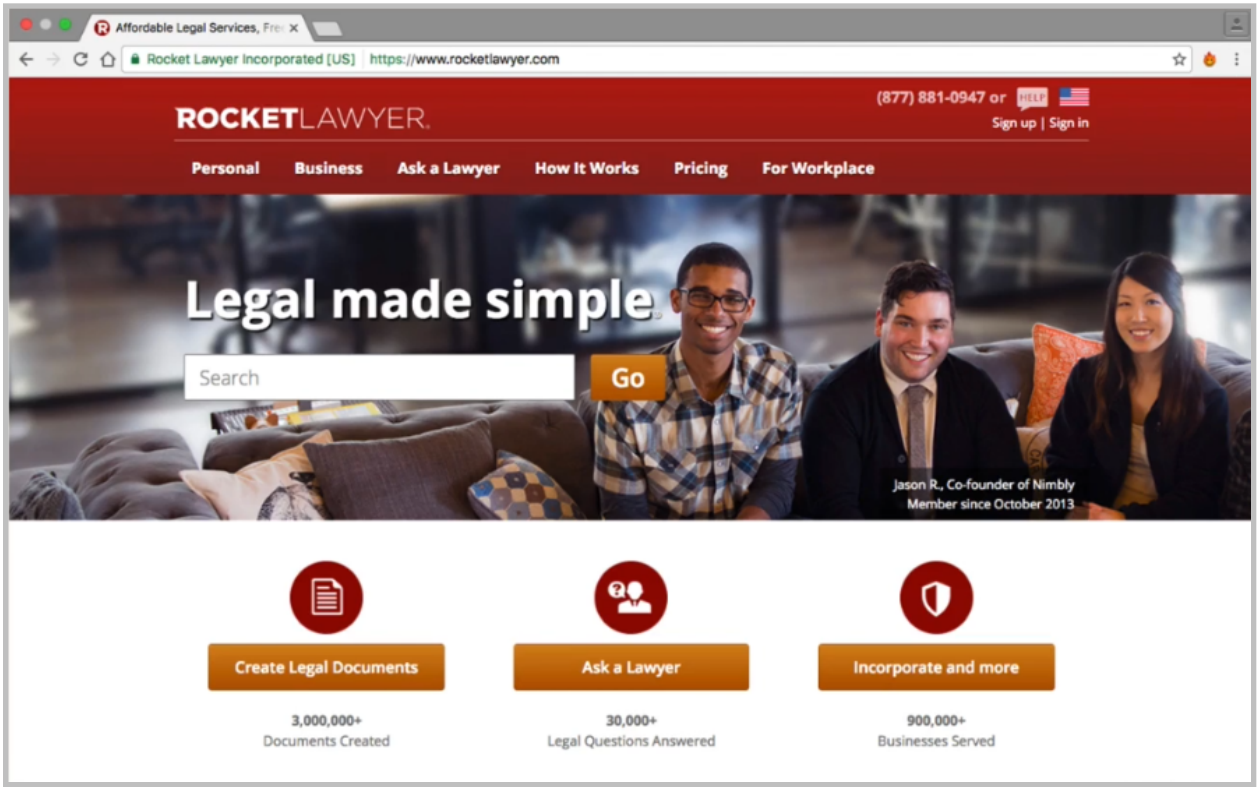
KRESSER INSTITUTE
FOR FUNCTIONAL AND EVOLUTIONARY MEDICINE

PM: Legal, Phone, and File Management

Hey, everybody. In this presentation, we're going to talk about back-end systems to support your practice such as legal, phone, and file management.

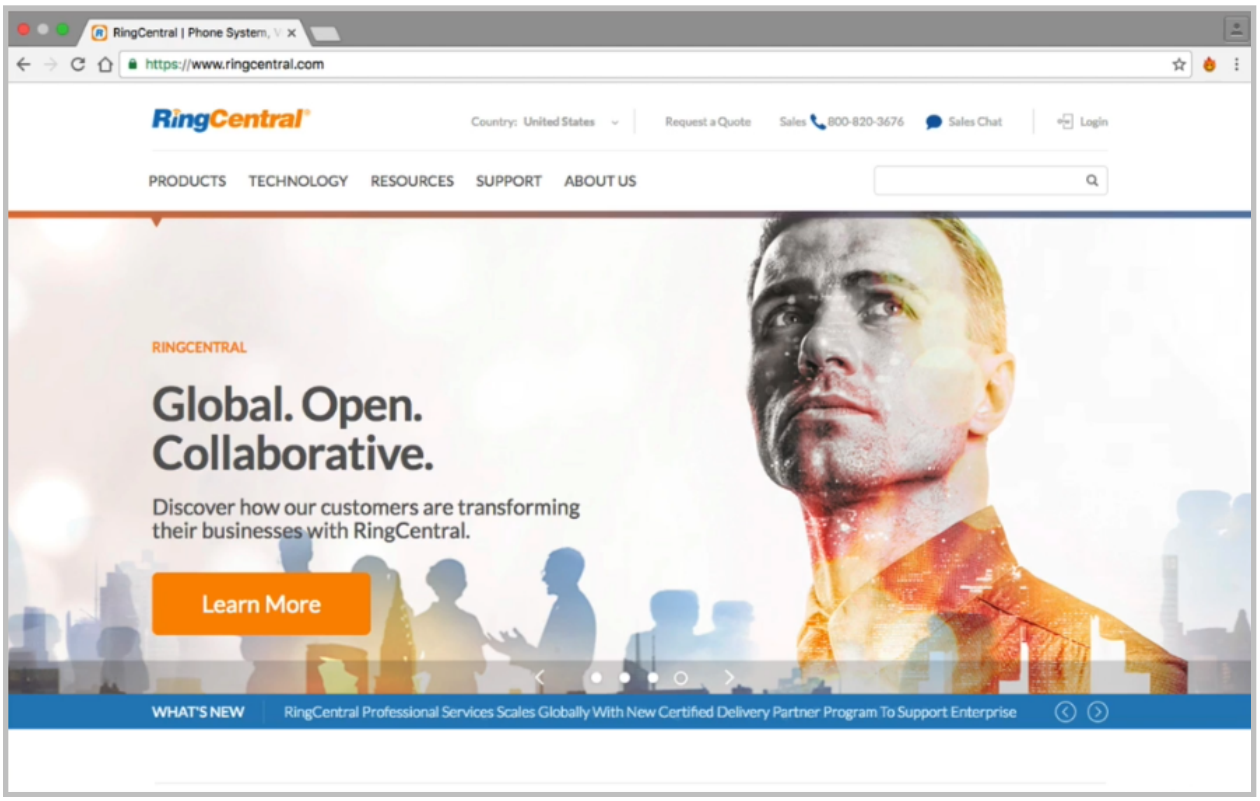
Let's start with legal. In another section of the practice management unit, I provided our forms for onboarding new patients, and these included informed consent, patient guide, and arbitration agreements. It's crucial to have new patients sign these documents to cover your legal bases, and it also clarifies patient expectations. Most malpractice insurance companies require that patients sign an arbitration agreement, so you're probably already familiar with that. We fine-tuned our informed consent and patient guide over the years in our practice, and they have been vetted, including very recently within the last two weeks of recording this by a healthcare attorney in California with over 40 years of experience. We're providing them to you so you can use them as a starting place for your own documents. That said, since regulations and laws differ from state to state and from licensing board to licensing board, I do suggest that you consult with a healthcare attorney in your area before you finalize the documents, but they should definitely save you time because your attorney won't have to draw them up from scratch, but you should get someone to take a look at them. This will be an expense initially, but it is well worth it to have peace of mind. We've consolidated the informed consent and patient guide into a single handout, and we'll provide it for you again in the resources for this section.

In any kind of medical practice, including a functional practice, issues will inevitably arise that you will need legal help with. Examples include how often you need to see long-distance patients in person, whether you are prescribing medication or not, whether you can do initial appointments via video, and hopefully less commonly, what to do if you have a really unhappy patient. At this point, we have a healthcare attorney who we consult about these issues that I mentioned on the last slide. He is very good, but, of course, not cheap to work individually with someone such as that.

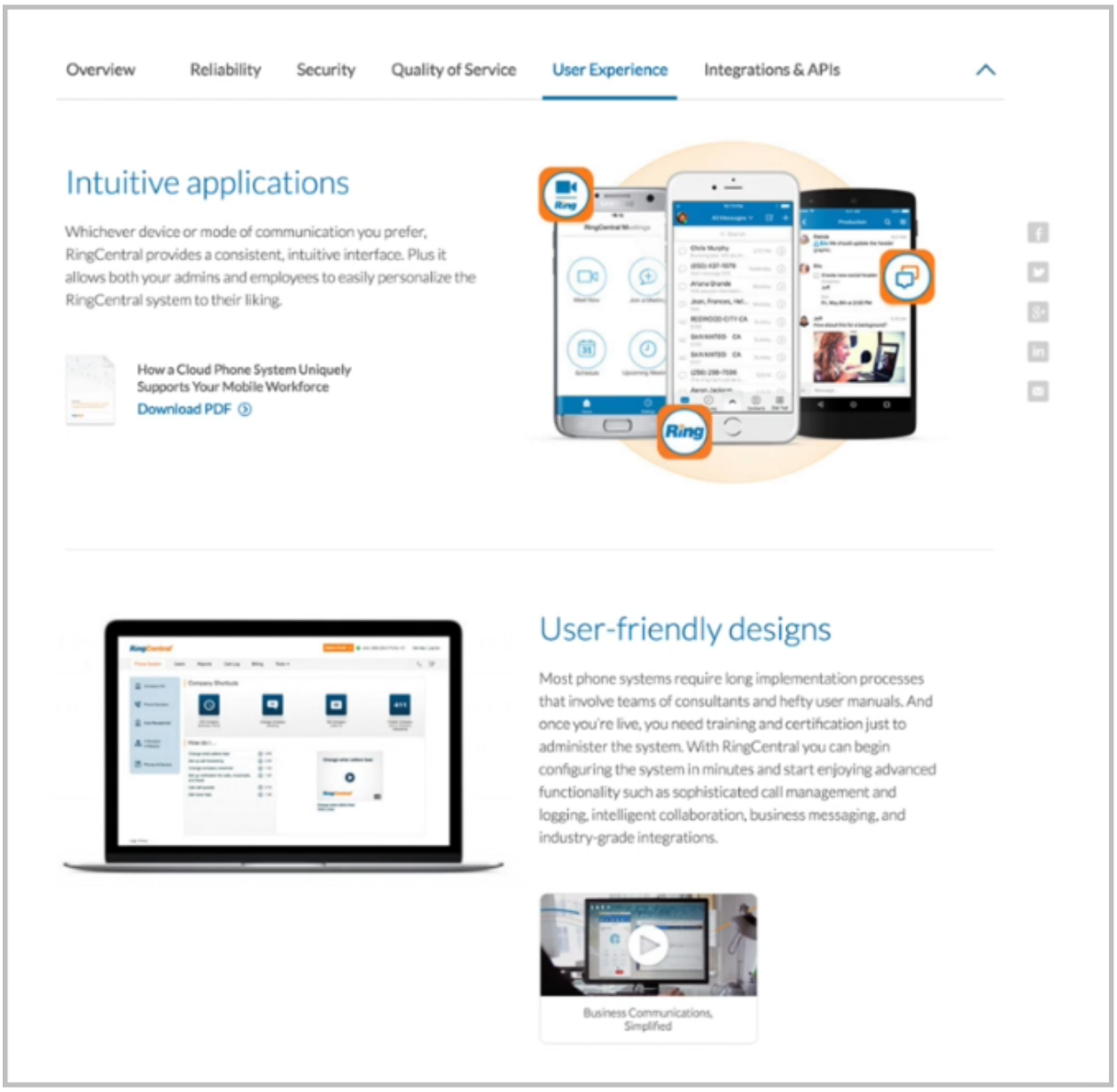


If you are just starting out, and this is what I did when I was starting out, you may want to consider a service such as Rocket Lawyer. It is a lot more affordable. At the time of this recording, you pay between $40 and $50 a month, and this gets you access to lawyers. It allows you to easily create a variety of legal documents with their templates, have your legal documents reviewed by attorneys, and incorporate your business. The downside, of course, is that it is not as personalized as working one on one with an attorney, and you won't have a single attorney who knows you and your business inside out and is dedicated to that.

Okay, let's talk about phone next. In a lean, distributed practice model, you will often not have a full-time receptionist. Your staff members may not even be on site, as they are not in our case, even with 14 staff members. They are distributed around the state and around the country. We have three different offices for clinicians, and the admin staff is not in any of those offices. This keeps our overhead and expenses low, and it helps us to avoid the main problem that a lot of medical practices and functional medicine practices face, which is not being profitable. Because of this, we do need a centralized phone system that is designed for this kind of lean, distributed, virtual office model.



The good news is there are a variety of services available like this. The one that we use is called RingCentral. We've evaluated several others over the years, and we continue to stay with RingCentral because we're happy with its feature set.



Here is how it works. Patient calls the main office number, and they hear a recording that you make. Ours says something like, "You've reached the California Center for Functional Medicine. If you're having a medical emergency, dial 911 or go to the ER. If you have a question about billing, press one. To reach a patient coordinator, press two. For questions about medication or supplement refills, press three. If you are calling to reach a clinician for a phone appointment, note that they will call you at the number you provided when you scheduled the appointment." Then, when they press one of those numbers, the call is routed to the appropriate person. You can set RingCentral up to ring several numbers at once. For example, if they press two for a patient coordinator, you can have it ring first that person's landline and then that person's mobile sequentially, or you can have them ring the landline or the mobile at the same time. This means that regardless of where that patient coordinator is, if they happen to be away from their home

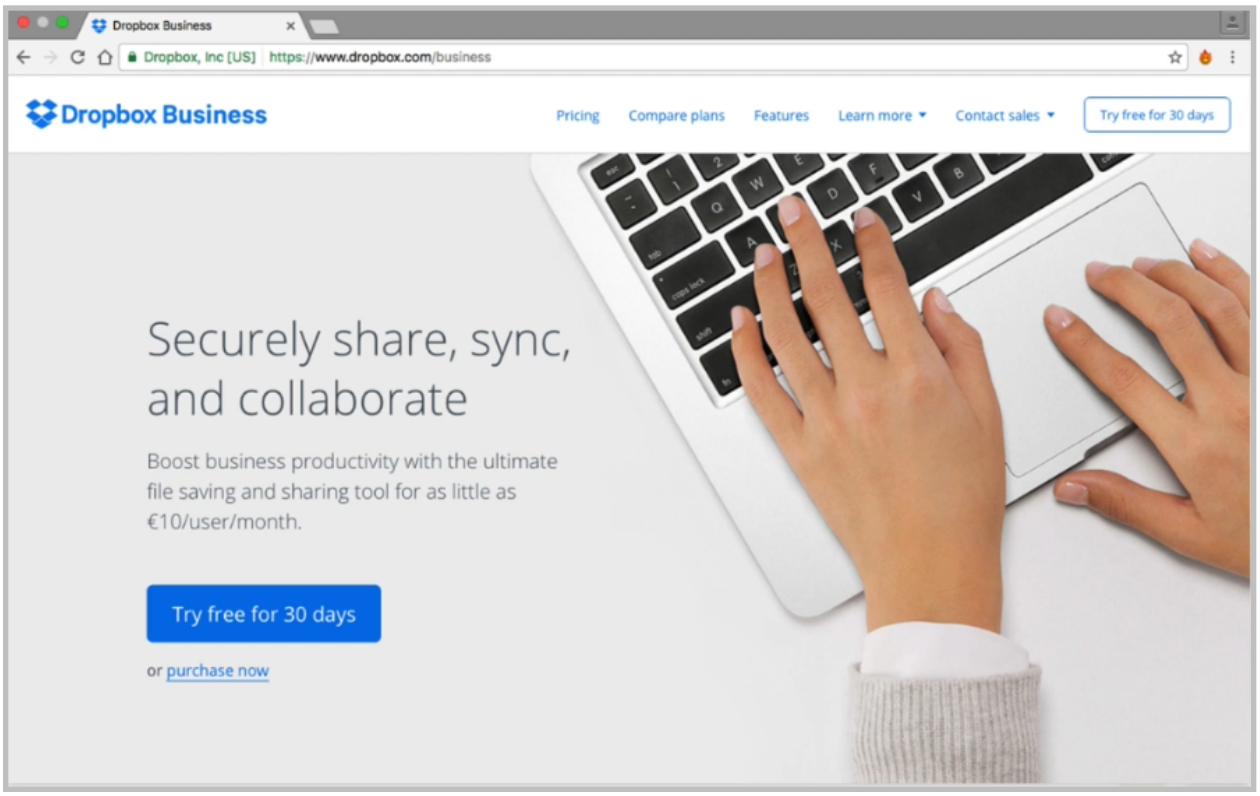
office, and they are maybe visiting family but they are still working, they are able to continue doing that work there. This gives you and your staff a lot of flexibility.

The other great thing about RingCentral is you can do outgoing calls from whatever phone number you are at, which appear to come from your main clinic number. For example, if I am in my home office, I open the RingCentral app on my Mac. I paste the patient's number into the dial pad, and then I hit Call. My landline rings. I pick it up, and it connects to the patient. It rings his or her phone. On the patient's phone, the caller ID that they will see will be the CCFM office number, not my home office number. If you're in front of a computer, which you almost certainly will be with using an EHR, you can also use your computer to dial out using RingCentral's app and using a voice-over-IP protocol, and it will also show your main clinic number as the caller ID. This gives you as a clinician a lot of flexibility.

I've done patient calls from Europe, Costa Rica, Hawaii, etc. A couple years ago before the ADAPT program, we spent a month in Costa Rica. I followed my own advice, and I did a complete unplug for two weeks where I was completely off the grid, not checking email, phone, or anything—not working in any way—but the second two weeks, I did my patient calls. I had a good internet connection, and I just did them from Costa Rica, and the patients had no idea that I was there, not that it was a secret, but this is the kind of flexibility that a system such as RingCentral affords you.

We put together a guide for how to set up RingCentral as a clinician handout for you for this week, as well as our greeting script, which, of course, you would customize for your own practice.

The last back-end system I want to talk about in this presentation is file management. If you embrace a hybrid distributed practice model, you're not going to be using file cabinets, almost certainly. Most of your patient-related files will be stored in MD HQ or whatever EHR you're using. However, you'll also want a central repository for storing original patient handouts, legal forms, employee agreements, financial reports, and other documents that aren't in the EHR.



There are a lot of choices out there for file storage, and we've tried a bunch of them, including SugarSync, Box, Dropbox, and Google Drive, and we've settled on Dropbox Business. I'm sure most of you are familiar with Dropbox, at least the personal version. It's a cloud-based file storage service with apps for Mac, PC, iOS, and Android. Dropbox Business adds some additional features above and beyond the personal version, such as unlimited storage space and unlimited file recovery, so you can see unlimited versions of files that you've stored or worked on in the past. To me, that feature is almost worth the price alone. Granular control of file or folder permissions—this is also really important in a business. For example, our financial documents for CCFM are only visible to me, Dr. Schweig, and our bookkeeper or financial manager, not any of the rest of the staff. There is phone support if you are having an issue and more advanced collaboration tools. The price at the time of this recording was $12.50 per user per month, starting at five users, I think a five-user minimum, so it's about $60 a month. It may not make sense if you are just starting out. Certainly, if you are in a solo practice, there is probably no need for it if you only have one or two staff members. We only recently switched to Dropbox Business. I think once we had about eight or nine staff members we switched to Dropbox Business, and now it is a big part of our workflow, and I think it is totally worth it.

Okay, that's it for this presentation. I'll talk to you soon.