

Computer Selection Checklist

The following functions are available in many basic computer software packages. Refer to this list when selecting those functions needed for your practice.

Billing, Collecting and Insurance

- Accounts receivable
- Age analysis of accounts receivable
- Managed care contractual write-offs
- Insurance aging list
- Programmed Medicare write-offs
- Insurance claims processing (hard copy and/or electronic transmission)
- Multipurpose claim forms
- National insurance companies, preloaded
- Patient billing
- Ability to bill individual and/or family
- Applying payments received to a selected open item
- Payment due notices printed on statement
- Itemization of all statements on demand
- Automatic default to not mail statements or bills less than \$00.00
- Dates of last charge/payment
- Amount of last charge/payment
- Low balance reports on demand
- Automatic collection messages
- Collection letters
- Customized collection notices
- Flags for collection reminders and promises
- Separate accounts receivable control for accounts turned over to collection
- Patient financial history
- Multiple fee profiles by doctor/insurance company
- Single keystroke for Medicare write-offs
- VSP tracing/reimbursement calculation
- Automatic billing back to secondary insurance and/or the patient
- Automatic insurance tracers
- Ability to enter multiple charges with a single keystroke
- Automatic generation of collection letters

Accounting

- Accounts payable
- Aged trial balance
- Cash reports
- Daysheet
- General ledger
- Income and expense statement
- Payroll processing

Scheduling and Follow-up

- Appointment scheduling
- Patient reminders
- Patient recall lists and letters
- Recall by diagnosis or medication
- Ability to schedule by examination room, staff schedule or doctor
- Can make multiple appointments

- Week-at-a-glance scheduling
- Appointment reschedule letters
- Viable time blocks as desired, by physician
- Surgery scheduling
- Ability to block out holidays, lunches, etc.
- Missed appointment letters

Practice Management

- Patient profiles by age, diagnosis, etc.
- Payment-type of reports
- Profiles by diagnosis, procedure, service, payers or desired classification
- Production reports by physicians
- Referral profiles
- Daily, monthly and yearly activity reports by physician, service, diagnosis and payer
- Debt/charge ratios by patient types, reimbursement types
- Debt/cost ratios by patient and reimbursement types

Word Processing

- Transcription
- Consultation reports
- Correspondence
- Graphics
- Desktop publishing
- Labels, addressing and mail merge

Clinical

- Access to national data banks
- CME programs
- Diagnosis lists
- Diagnostic tests
- Patient records
- Treatment protocols
- Prescription information
- Multiple family members on same patient chart
- Drug interaction and allergy checks
- Literature retrieval
- Medical records
- Procedure coding lists
- Protocols, diagnosis and treatment
- Prescription-writing
- Designated data search

Dispensing, Ordering, Point-of-Sale

- Automatic costing of job directly from prescription to patient account
- Automatic ordering of lenses and frames directly from prescription
- Adjustment of inventory for sales and purchases
- Ability to track contact lens inventory for sales and purchases
- Ability to track contact lens inventory and sales
- Aging of inventory
- Archive of patient prescriptions

Cost of Summary

Direct Expenses

Hardware	_____
Software	_____
Less 5-year depreciation	_____

Total Direct Expenses

Set-Up Expenses

Software modification	_____
Programming	_____
Training	_____
Installation	_____
Wiring	_____
Cabling	_____
Maintenance	_____
Finance charges	_____
Shipping	_____
Conversion	_____
Forms design	_____
Supplies	_____
Consulting fees	_____
Attorney	_____
Accountant	_____
Leasehold	_____
Other site preparation	_____
Telephone	_____
Furniture	_____
Insurance increase	_____
Modem and other enhancements	_____
Cost of continuing manual systems for ___ months	_____

Total Set-Up Expense

On-Going Expenses

Additional personnel	_____
Training	_____
Maintenance	_____
Hardware	_____
Software	_____
Supplies	_____
Telephone	_____
Financial charges	_____
Insurance	_____
Utilities	_____

Total On-going Expenses

Comparison Sheet

General Information	System A	System B	System C	System D
How long have you been in business?				
How many systems have you installed?				
How many ophthalmologists do you have as clients?				
Who are your references?				
Are you willing to post a performance bond?				
Are we allowed to have access to the vendor's financial statements?				
Will you provide a timetable for installation with penalties for failure to complete?				
Are there license conditions under which the software package is proposed?				
How can the package fail to function?				
What are your contracted performance guarantees (downtime)?				
Do you provide programs for inventory, clinical research and scheduling?				
Do you have a toll-free help line?				
What language is the program?				
Patient Registration				
Are there name searches?				
Are account numbers assigned automatically?				
How are duplicates prevented?				
Can the system electronically bill insurance?				
Is secondary insurance billed automatically?				
Is there a way to flag traced insurance items?				
Can statements be suppressed?				
Can credits and charges be entered at the same time?				
Can you delete erroneous details from a patient's statement?				
How is incomplete date handled?				
Administration				
Can you preload accurate and timely ICD-9 descriptions?				
Can you enter referring physicians alphabetically rather than by physician number?				
Does the program have statistical research capabilities?				
Can the system produce RVU/CPT fee tables sorted numerically and alphabetically?				
Can it generate patient mailing lists and labels?				
Do you provide training at installation?				
At what costs?				
Do you train new employees?				
At what costs?				

Accounting	System A	System B	System C	System D
Can you handle account collections and patient inquiries?				
Can you provide individual patient accounts on aged balances?				
Does the system use "open -item" posting?				
Do you have collection lists of "promises not met?"				
Can you handle the same patient with different status and insurance for different procedures?				
How many ICD-9 codes can a patient have?				
How many insurance carriers can a patient have?				
Whose expense is a government-mandated program change?				
Do accounts have to be zeroed at year-end?				
Do you provide collection percent ratios?				
Systems and Hardware				
What does the system cost?				
How are these costs broken down?				
How many terminals will the system support?				
How far can a terminal be from the computer?				
How many printers will the system support?				
What support is needed for the hardware and software?				
Do you provide support for hardware and software?				
How much will support cost?				
Does the system handle satellite stations via modem for other offices?				
What is the cost of a satellite?				
How does it affect speed and performance?				
How can the system be upgraded for my future practice needs?				
Who provides this upgrade and training?				
What kinds of warranties come with the software and hardware?				
Where is the service center?				
What is the average delivery or repair time?				
What type of contract is requested --- cost plus fixed fee, fixed, cost and materials, other?				
Do we have any rights to modify the original software?				
Is there a protection against unreasonable increases in maintenance fees?				