

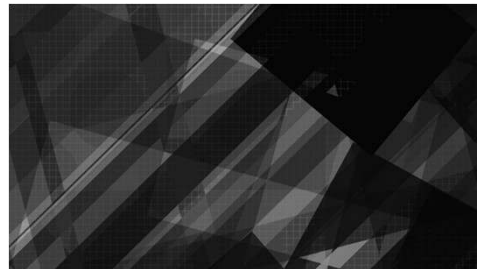
CHIROPRACTIC OFFICE MANAGEMENT: BEYOND THE BASICS

Lisa Maciejewski-West, CMC CMOM CMIS
CPCO

Owner/Founder, Gold Star Medical Business
Services

www.goldstarmedical.net

info@goldstarmedical.net 866-942-5655



1

**I'VE JUST BEEN
PROMOTED TO
OFFICE
MANAGER**

Now what?



2

REALITY OF OFFICE MANAGER PROMOTIONS

Most Chiropractic office managers are promoted from within the company

Most practice owners don't really have a clear picture of what they want their office manager's role to be

3

DEFINING THE ROLE OF YOUR OFFICE MANAGER (WHAT DO YOU WANT AN OM TO DO FOR YOU?)

- Staff Management
 - Hiring/Firing/Counseling
 - Training new Staff
 - Managing Staff Schedules, vacations, time off
 - Payroll
 - Bonuses
 - Daily Department Management/Oversight
 - Employee Retention/Employee Morale
- Patient Management
 - Ensuring Smooth/Seamless Operation of Patient care
 - Handling Disgruntled Patients
 - Implementing/Enforcing Office Policies
- Provider Management
 - Provider Schedules/Coverage
 - Provider Compliance

4

DEFINING THE ROLE OF YOUR OFFICE MANAGER (WHAT DO YOU WANT THEM TO DO FOR YOU?)

- Compliance and Law
HIPAA, OSHA, FCA, EEOC, No Surprises,
ADA, STARK, AKS
- Financial Management
Oversight of Billing Department
Billing Compliance
Accounts Receivable Management
Accounts Payable Management
Inventory Control/Supplies
Budgeting/Overhead Management
- Project Management
EMR/Software Migrations
Technology Analysis and Implementation
Research New Revenue Streams, Ancillaries
New Patient Acquisition Projects
- Provider Management
Provider Schedules/Coverage
Provider Compliance
Provider Credentialing and Maintenance

5

PROMOTIONS

- THINKING ABOUT IT?
Develop a job description
Set Benchmarks
Assess Current Staff for qualifications
Consider hiring from outside the organization
Can one person do it all?
Is the Office Manager also going to continue
working in their current position?
- ALREADY PROMOTED?
Is there a Job Description?
Have Benchmarks been Set?
Is the current office manager cut out for the
job?
Are they able to get everything done?
Is this an "in name only" promotion to make a
current employee feel more important, or have
their job duties actually changed?

6

ESSENTIAL QUALITIES OF AN OFFICE MANAGER

- Knowledge of Operations they will be responsible for
- Natural Leader
- “First one in, last one out” – Commands Respect
- Delegates tasks, but is willing to jump in and help when needed
- Mindful of Laws that Govern Healthcare, Staff and Practice Management
- Ability to separate themselves from the rest of the staff – not their buddy
- Proactive, not reactive
- Cool Head/Professional at all times
- Maintains strict confidentiality in all areas of office and staff operations

7

STAFF MANAGEMENT CHALLENGES

- Promoted- you are now supervising people you worked alongside. How are they responding to your authority over them?
- How are you going to communicate throughout the day?
 - ✓ **Make rounds, see how everyone is doing. Ask if they need help with anything**
 - ✓ **Chat feature**
 - ✓ **Shift Huddle**
 - ✓ **Avoid Micromanaging**
 - ✓ **Avoid “under Managing”**
- Stay ahead of coverage needs. Is someone going to be out?
- Have contingency plans for unexpected absences
- Develop a WRITTEN HR policy with your Practice Owner – review with staff and use as a guidance document

8

LABOR LAWS

There are many labor laws that employers must adhere to.

Employers must be mindful of both Federal AND State Law

The law that offers the highest level of protection for the employee is the superceding law

**EXAMPLE: Federal Minimum Wage is \$7.25/hr
Virginia Minimum Wage is \$12/hr. Virginia wins.**

9

LABOR AND HR LAWS TO BE MINDFUL OF

- **FLSA-Fair Labor Standards Act:** Governs Minimum Wage, overtime pay, break rules and exempt vs. non exempt employees
 - EXEMPT EMPLOYEES:** Means they are EXEMPT from having to be paid overtime, which is 1.5X average hourly OR salary wage.
 - NON-EXEMPT EMPLOYEES: Are NOT exempt from having to be paid overtime
- How do I determine if an employee is exempt?
 - > **Not by salary vs. hourly**
 - > **Must be in an Administrative or Professional position:** Ability to make departmental decisions, set policies, hire/fire, or be in a professionally technical position (ie: Doctor of Chiropractic, Associate Dr)
 - > The federal **overtime rule** stipulates that the minimum salary requirement for administrative, professional, and executive exemptions is \$684 per week, or \$35,568 per year. Virginia is in alignment with Federal Law

10

FAQ: SEMINAR AND TRAINING PAY

- I want to take my employee to a Seminar next weekend. I'm going to cover the costs of the seminar, travel, and all expenses. Do I have to pay them their hourly wage as well?
- Is the training mandatory?
- YES: Pay them, and if their hours exceed 40 in a pay period, pay 1.5x unless EXEMPT
- Pay: Time in class, and travel time
- NO: Not required to pay them. NO RETALIATION IF THEY CHOOSE NOT TO COME. You may not enforce attendance.
- COMP TIME/VACATION: You may offer comp time in lieu of overtime pay, but the comp time must be in the same pay period as the required training

11



MAKE SURE YOU HAVE ALL
APPLICABLE AND REQUIRED
LABOR LAW POSTERS
PROMINENTLY DISPLAYED IN A
COMMON AREA THAT IS
ACCESSIBLE TO ALL EMPLOYEES

MAKE SURE POSTERS COVER
BOTH FEDERAL AND STATE
LAWS

NEW POSTERS EVERY YEAR

<https://www.eeoc.gov/poster>

12

LABOR AND HR LAWS TO BE MINDFUL OF

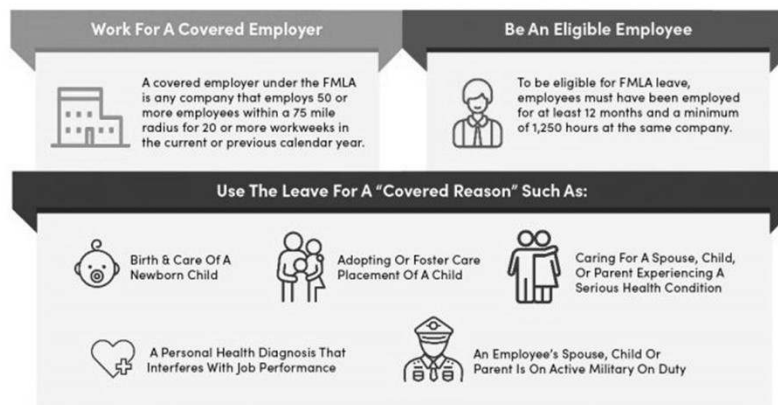
- Title VII of the EEOC (Equal Employment Opportunity Commission) This is the law that protects people from employment discrimination on the basis of race, color, religion, sex, national origin or pregnancy status.
- Age Discrimination in Employment Act (ADEA): This law is often lumped in with Title VII when it comes to discrimination, but this is actually a separate act that protects people who are over 40. **Avoid Age Discrimination:** You can't say, "we're looking to hire young and energetic people!" Don't make age-related jokes and don't start asking older employees when they plan to retire. Only the employee gets to make that decision.
- NLRA- National Labor Relations Act: This law protects your employees' right to talk about their working conditions. This means it's illegal for you to prohibit or punish employees for talking about their salaries or for complaining about scheduling.

13

FMLA (FAMILY MEDICAL LEAVE ACT)

When is an Employee Eligible to Take FMLA? The 3 Qualifications

To take FMLA leave, an employee must:



EmPower HR

14

ADA - AMERICANS WITH DISABILITIES ACT

What Employers Are Covered by the ADA?

Job discrimination against people with disabilities is illegal if practiced by:

- private employers,
- state and local governments,
- employment agencies,
- labor organizations,
- and labor-management committees.

ADA AFFECTS EMPLOYERS WITH 15 OR MORE EMPLOYEES WITHIN A 75 MILE RADIUS

15

WHAT CONSTITUTES A DISABILITY?

To be protected under the ADA, an individual must have a record of, or be regarded as having a substantial, as opposed to a minor, impairment. **A substantial impairment** is one that significantly limits or restricts a major life activity such as hearing, seeing, speaking, walking, breathing, performing manual tasks, caring for oneself, learning or working.

<https://www.eeoc.gov/laws/guidance/your-employment-rights-individual-disability>

16

ADA AND REASONABLE ACCOMMODATION

What is Reasonable Accommodation?

- Reasonable accommodation is any change or adjustment to a job or work environment that permits a qualified applicant or employee with a disability to participate in the job application process, to perform the essential functions of a job, or to enjoy benefits and privileges of employment equal to those enjoyed by employees without disabilities. For example, reasonable accommodation may include:
 - providing or modifying equipment or devices,
 - job restructuring,
 - part-time or modified work schedules,
 - reassignment to a vacant position,
 - adjusting or modifying examinations, training materials, or policies,
 - providing readers and interpreters, and
 - making the workplace readily accessible to and usable by people with disabilities.

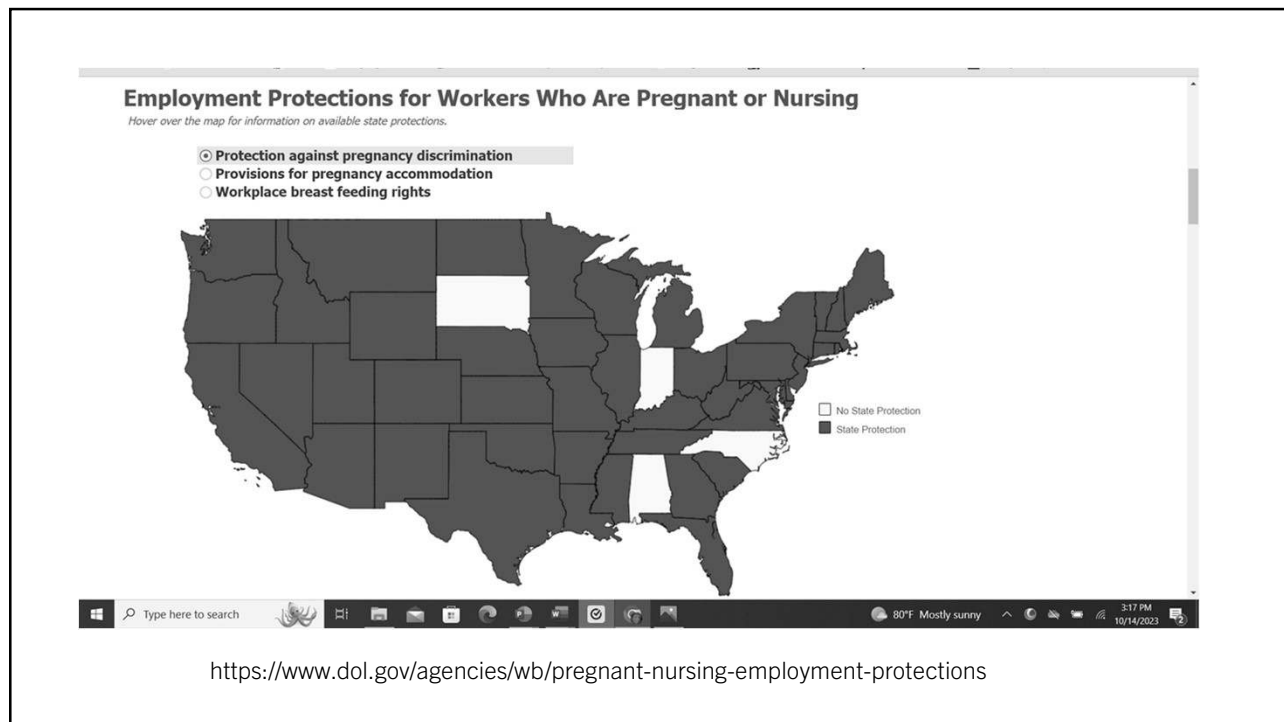
17

PREGNANT WORKERS FAIRNESS ACT (EFFECTIVE JUNE 27, 2023)

- The Pregnant Workers Fairness Act (PWFA) is a new law that requires covered employers to provide “reasonable accommodations” to a worker’s known limitations related to pregnancy, childbirth, or related medical conditions, unless the accommodation will cause the employer an “undue hardship.”
- The PWFA applies only to accommodations. Existing laws that the EEOC enforces make it illegal to fire or otherwise discriminate against workers on the basis of pregnancy, childbirth, or related medical conditions.
- The PWFA does not replace federal, state, or local laws that are **more protective** of workers affected by pregnancy, childbirth, or related medical conditions. More than 30 states and cities have laws that provide accommodations for pregnant workers.

COVERED EMPLOYERS = 15 OR MORE EMPLOYEES WITHIN A 75 MILE RADIUS

18



19

MANAGING THE DAILY OPERATIONS

- OPENING
 - ✓ Morning Shift Huddle
 - ✓ Everybody in place?
 - ✓ Review the schedule
 - ✓ Review the patients – any problem patients coming in, patients with overdue balances, etc
 - ✓ Provider considerations – anyone out, or have to leave early?
- DURING THE DAY
 - ✓ Everyone staying on time?
 - ✓ Everyone staying on task?
 - ✓ Any monkey wrenches or brushfires to deal with?
- CLOSING
 - ✓ Daily checks and balances “when the day is over, the day is over”
 - ✓ All patients accounted for
 - ✓ All Money accounted for
 - ✓ Secure computers/technology
 - ✓ Charges entered in system for billing or sent to billing company
 - ✓ Provider notes completed

20

FRONT DESK OPERATIONS MANAGEMENT

- ✓ What job duties are expected of the Front Desk CA? Office Manager checklist:
 - ✓ Scheduling
 - ✓ OTC Collections
 - ✓ Traffic Management
 - ✓ Keeping providers on time and focused through block scheduling
 - ✓ Patient Engagement
 - ✓ Profiling New Patients
 - ✓ Updates to Existing patients, ie: new insurance cards, coordination of benefits
 - ✓ CLOSING CHECK AND BALANCE: All OTC collections accounted for, match daysheet
 - ✓ CLOSING CHECK AND BALANCE: ALL APPOINTMENTS ACCOUNTED FOR, patients are properly checked in and out
 - ✓ Charges entered for the day, match daysheet (this may be a function of provider or biller)

21

BILLING OPERATIONS MANAGEMENT

- ✓ What job duties are expected of the Billing Department? Office Manager checklist:
 - ✓ Scrubbing and Billing
 - ✓ Clearinghouse/Payer rejects worked
 - ✓ Insurance Payments posted/recorded
 - ✓ Verification/Eligibility of Benefits on new and returning patients (may also be a FD duty)
 - ✓ Denials and Appeals
 - ✓ Working A/R
 - ✓ CLOSING CHECK AND BALANCE: All Insurance collections accounted for, match day sheet
 - ✓ CLOSING CHECK AND BALANCE: Billing report on Office Manager's desk
 - ✓ Charges entered for the day, match daysheet (this may be a function of provider or biller)

22

CLINICAL OPERATIONS MANAGEMENT

- ✓ All rooms properly stocked and cleaned
- ✓ Sufficient inventory (ie: BioFreeze, Vitamins/Supplements, Braces, etc)
- ✓ Equipment in good working order
- ✓ Clinicians staying up to date with their notes
- ✓ Clinicians staying on time
- ✓ Properly routing patients to CT's for therapy/rehab
- ✓ Ancillaries OK? (Nutritionist, Acupuncture, etc)

23

OMG!! DO I HAVE TO DO ALL THIS???

NO! These checklists are to be used with your staff to provide guidance on what needs to be done. Make them do, and report to YOU.



24

TRAINING AND STAFF DEVELOPMENT

25

OFFICE MANAGER'S ROLE IN TRAINING

- MANDATORY TRAINING:
 - ✓ Departmental: Front Desk, Billing, CT/Back Office
 - ✓ HR Policies – Review with staff within 30 days of employment
 - ✓ HIPAA Training - Annually, everybody!!!!
 - ✓ Providers: Documentation, Billing Laws
- SUPPORTIVE/NON MANDATORY TRAINING:
 - ✓ Billing and Coding seminars
 - ✓ Personal Development Training
 - ✓ Higher Education
 - ✓ Certifications
 - ✓ New Revenue Streams

26

GOLD STAR MEDICAL OFFERS PRACTICE CONSULTING SERVICES

- Hourly \$150
- 10 hours prepaid \$1250
- Annual (12 month commitment): Includes written practice analysis and game plan, coaching calls, unlimited email support \$500/month, or \$5000 prepaid.
- **CONFERENCE SPECIAL 10% DISCOUNT ON ALL CONSULTING SERVICES, MUST PURCHASE BY DEC. 1, 2023**
- Call 325-650-5067 FMI, ask for Rick or Lisa

27

~

27

NEXT UP: PRACTICE MANAGEMENT BY THE NUMBERS

QUESTIONS?

- Call Lisa Maciejewski-West at Gold Star Medical Business Services for a **Complimentary Consultation**
- Phone: Toll free 866-942-5655 OR 325-650-5067
- Email: info@goldstarmedical.net
- Visit website: www.goldstarmedical.net
- Facebook: www.facebook.com/goldstarmedical

28