

# Building the Ideal EHR System for Concierge Medicine



## Contents

|   |   |
|---|---|
| <b>Executive Summary</b>                                | 1 |
| <b>EHRs fail Concierge Medicine</b>                     | 1 |
| Not designed for primary care                           | 1 |
| Cognitive overload                                      | 2 |
| Not designed for concierge business model               | 2 |
| <b>Designing an EHR system for Concierge Medicine</b>   | 2 |
| Problems provide the answer                             | 3 |
| Support for membership and billing                      | 4 |
| Cloud-based for lower costs and less headache           | 5 |
| Support for “High-Touch” medicine                       | 5 |
| Basic tools of the practice: interfaces, eRX, and faxes | 6 |
| <b>InLight EHR, Practice Essentials</b>                 | 6 |

## Executive Summary

Concierge Medicine is poorly served by today's Electronic Health Record (EHR) systems. Instead of improving the quality of healthcare delivery and making concierge physicians more efficient, EHR systems often have the opposite effect.

Here at Pri-Med, we've taken a close look at concierge physicians and their clinical documentation systems. We came to a few interesting conclusions, which resulted in a "blueprint" for a better approach to EHR systems. By reading this white paper, you will learn about:

- The unique challenges for concierge physicians using EHR systems;
- How EHR systems fail concierge physicians on two levels:
  - the business of running a practice; and,
  - the care delivered to patients;
- A new problem-based approach to EHR systems that can enhance professional satisfaction and improve patient care.

## EHRs fail Concierge Medicine

EHR systems fail to meet needs of Concierge Medicine in two distinctly different ways. On one level, they do not help concierge physicians practice better medicine. In fact, EHR systems can actually increase cognitive overload, which at best reduces the ability to deliver high-touch medicine, and at worst leads to medical mistakes. On another level, EHR systems do not support the business requirements of a concierge practice, such as retainer-billing options.

## Not designed for primary care

Why do so many concierge physicians see a permanent drop in productivity when they start using an EHR system? Why can't they use an EHR system to complete a note during the patient visit the way they could with a paper chart?

Perhaps it's because Concierge Medicine is really about delivering primary care, and most EHR systems are not designed with primary care in mind. That's why in a 2014 JAMA survey<sup>1</sup>, family practice physicians reported an EHR-associated loss of 48 minutes of free time per clinic day.

If EHR systems require doctors to spend more time on documentation than they did using paper charts, poor usability and badly designed interfaces are the culprits. According to a 2013 Rand/AMA Study<sup>2</sup> on Factors Affecting Physician Professional Satisfaction, aspects of current EHR systems that were particularly common sources of dissatisfaction included:

- Poor usability
- Time-consuming data entry
- Interference with face-to-face patient care

If software is difficult to use, and forces users to take extra steps, it must by definition slow them down. The extra time spent typing and clicking takes away from the finite amount of time concierge physicians can spend on all the other things that take up their busy days.

1 <http://archinte.jamanetwork.com/article.aspx?articleid=1901114>

2 [http://www.rand.org/pubs/research\\_reports/RR439.html](http://www.rand.org/pubs/research_reports/RR439.html)

## Cognitive overload

Physicians think in problems, but EHR systems organize patient data by source. For example, lab results for a particular patient are commonly presented in a single list, regardless of the problems for which they were ordered. The same source-based organizing principle is used for medications, exam notes, orders, referrals, etc.

As a result of this mismatch, many physicians are overwhelmed by how patient information is captured and presented by EHR systems.

A concierge physician seeing a patient with three active problems must mentally juggle an average of twenty individual data points during the visit. If she sees just five patients per day, she is handling more than 100 critically important pieces of information. Miller's Law famously states that the number of objects an average human can hold in working memory is  $7 \pm 2$ , or a maximum of nine.

No wonder concierge physicians often feel as if they are drowning in an ocean of disorganized EHR data when confronted with patients having multiple problems. The capacity to effectively multitask is often stretched beyond its limits, leading to cognitive overload, which impairs the medical decision-making process and can lead to misdiagnosis, medical errors, and other potentially life-threatening mistakes.

## Not designed for concierge business model

A new model of practice requires a new approach to EHR systems. Unfortunately, the vast majority of EHR systems are not designed to support the unique requirements of the Concierge Medicine business model.

According to Pri-Med research, over 80 percent of concierge physicians accept insurance in their practice, while the remaining have cash-only, menu-style healthcare practices. Therefore, most concierge practices not only charge patients a monthly or annual retainer, but must also generate third-party insurance claims (i.e. CMS-1500 forms) for patients to submit to their carriers.

EHR systems place too much emphasis on coding for maximum reimbursement. They frequently have coding roadblocks – such as requiring a diagnosis code to close a chart. This increases the number of steps in the workflow and clicks required to get through a chart.

Additionally, most EHR systems do not support the billing or management of patients as “retainers” of a concierge practice. There is no way to create different “tiers” of retainers, or use ACH withdrawals to collect retainer payments, or even collect cash payments at the end of a visit.

On the other hand, the small handful of EHR systems designed for the “direct care” market don't include integrated fee-for-service billing, or integration with third-party practice management systems, leaving concierge practices unable to generate insurance claims for patients.

## Designing an EHR system for Concierge Medicine

What if you could close your eyes and imagine the perfect EHR system for Concierge Medicine physicians and their practices? What would it look like? What would it do?

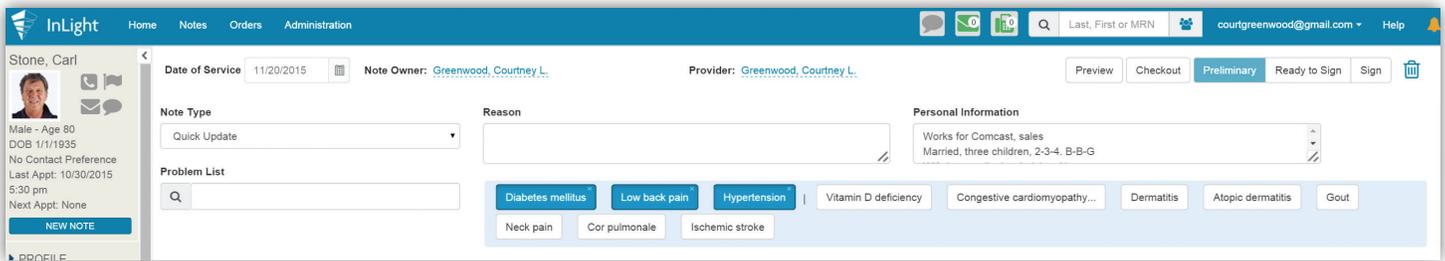
That's exactly what we've done here at Pri-Med – we looked at the deficiencies of EHR systems, from both clinical and practice standpoints, and how we could fix them. Then we reimagined the EHR system for Concierge Medicine. Here's what it looks like:

## Problems provide the answer

For better care delivery, EHR systems require a problem-based approach to organizing and presenting patient information. This approach changes how the concierge physician interacts with the EHR.

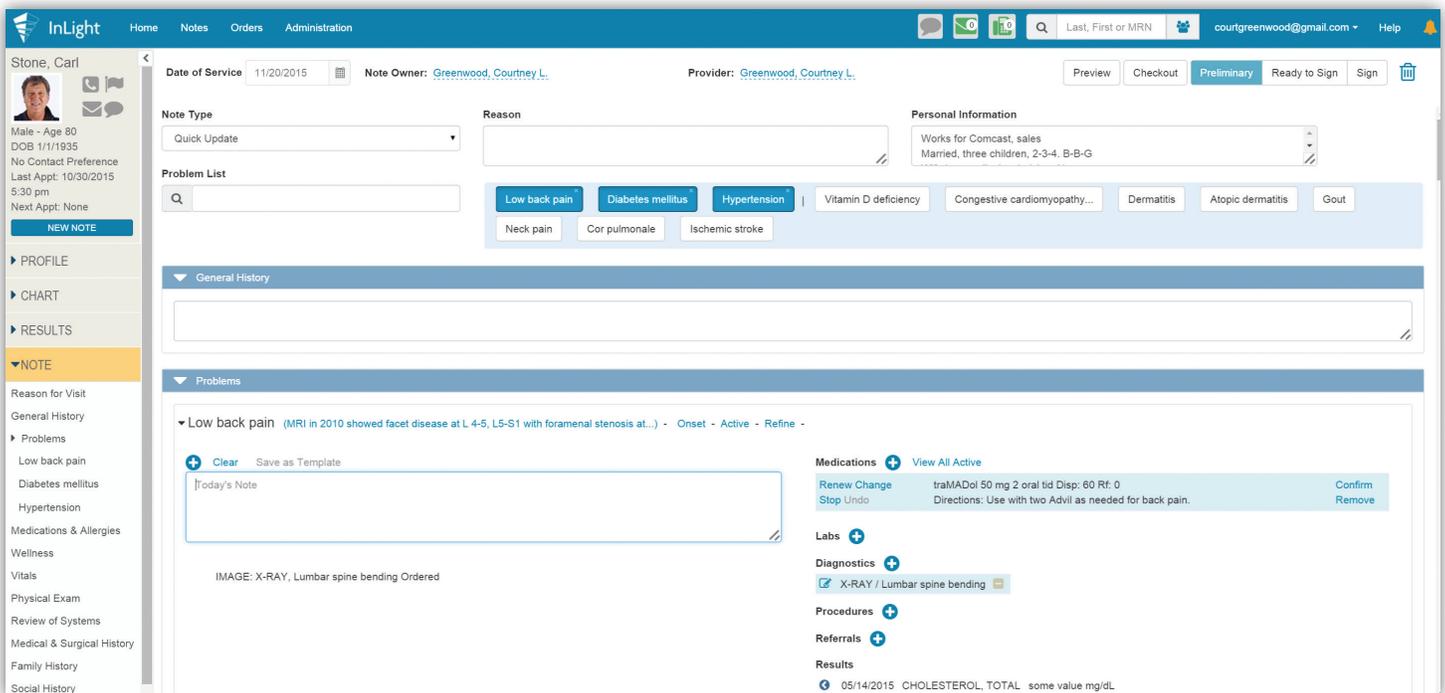
In the problem-based approach to organizing information and workflow, all notes, medications, labs, orders, referrals, etc. are associated with specific patient problems. The problem list provides a “table of contents” of specific relevant clinical issues that can be viewed longitudinally over time (see Figure 1).

FIGURE 1: EHR SYSTEM WITH A PROBLEM LIST PROVIDES A QUICK SNAPSHOT OF A PATIENT’S AGENDA FOR THE VISIT (SCREEN COURTESY OF PRI-MED INLIGHT EHR)



This intuitive interface allows the concierge physician and patient to set an agenda for the office visit and then review problems in a way that supports the nonlinear nature of a medical encounter (see Figure 2).

FIGURE 2: DETAIL OF A PATIENT CHART BASED ON A PROBLEM (SCREEN COURTESY OF PRI-MED INLIGHT EHR)



Perhaps most importantly, an EHR that uses patient problems as its organizing principle can help reduce cognitive overload in the exam room. Concierge physicians will see patient health information associated with a specific problem(s), easing the number of mental connections required to make a sound medical decision and, by extension, reducing risk of misdiagnosis and error.

## Support for membership and billing

EHR systems should make it easy for concierge physicians to profitably operate and successfully grow their practices. The goal should be to “Do good doctoring and get paid fairly for what you do.”

The ideal EHR for concierge practices would support a hybrid approach to billing that includes the following elements:

- Comprehensive retainer management fully integrated with the clinical record in the EHR
- Support for a variety of retainer plans (individual, group, etc.), billing periods (monthly, annually, etc.) and discounts (see Figures 3 and 4);
- Centrally managed charges to allow for efficient ordering and prescription management
- Export charges to the Practice Management system of your choice;
- Print-out Medicare CMS-1500 forms;
- Free merchant integration; and,
- Easy cash receipts.

FIGURE 3: EHR SYSTEM WITH RETAINER BILLING BY AGE (SCREEN COURTESY OF PRI-MED INLIGHT EHR)

### Edit Membership Plan ✕

**\* Name**

**\* Plan Rate Type** **Fee Schedule**

**\* Age Ranges**

| From Age | To Age                          | Charge Amount                          | Actions                |
|----------|---------------------------------|--|------------------------|
| 0        | <input type="text" value="18"/> | <input type="text" value="\$ 80.00"/>  | <a href="#">Delete</a> |
| 19       | <input type="text" value="55"/> | <input type="text" value="\$ 100.00"/> | <a href="#">Delete</a> |
| 56       | All                             | <input type="text" value="\$ 120.00"/> |                        |

[Add Age Range](#)

Active

\* Required Fields

FIGURE 4: MULTIPLE LEVELS OF CONCIERGE RETAINER PLANS INTEGRATED WITH AN EHR SYSTEM  
(SCREEN COURTESY OF PRI-MED INLIGHT EHR)

| Name                    | Active | In Use | Actions       |
|-------------------------|--------|--------|---------------|
| Bronze Membership Plan  | Yes    | Yes    | Delete   Edit |
| Flat rate plan          | Yes    | Yes    | Delete   Edit |
| Gold Membership Plan    | Yes    | Yes    | Delete   Edit |
| Goodyear Auto Employees | Yes    | Yes    | Delete   Edit |
| Medcalf Family Plan     | Yes    | No     | Delete   Edit |
| Silver Membership Plan  | Yes    | No     | Delete   Edit |

## Cloud-based for lower costs and less headache

Concierge Medicine offices tend to be small in size. According to our research, 58 percent of concierge physicians have just one to two employees. These types of practices do not have the budget for expensive IT consultants.

An ideal EHR system for concierge practices would be fully cloud-based, resulting in the following benefits:

- No need to purchase and maintain servers, routers, and other expensive hardware equipment;
- Eliminates IT headaches and the expense of hiring technicians;
- Always on the latest software version without cumbersome upgrades; and,
- Greater simplicity, easier training, and lower going operating costs.

## Support for “High-Touch” medicine

One of the joys of Concierge Medicine is the ability to practice “high-touch” medicine that gives patients a highly personalized experience. This means taking advantage of the latest technologies to allow concierge physicians and patients to communicate and track activities outside of the face-to face visit in the office.

A cloud-based EHR, for example, gives a physician the freedom to access records anytime, anywhere on a tablet or Chromebook. This makes it easier to perform special services outside the office, such as house calls or hospital/nursing home visits.

Next-generation patient engagement platforms like [Twistle](#) bring high-touch medicine to the next level with secure HIPAA-compliant email and text messaging with the capability to share pictures, videos, and documents.

An EHR system designed for concierge practices should integrate all of these tools seamlessly, so lab results can be securely sent to a patient’s mobile phone with the push of a button.

## Basic tools of the practice: interfaces, eRX, and faxes

Our research uncovered a few more features that concierge practices need in an EHR system:

- Direct interfaces with labs so results can be placed in the patient chart in real time, improving accuracy and resulting in better patient care;
- Electronic prescribing, which is preferred by most pharmacies today; and,
- Fax integration, allowing concierge practices to receive faxes electronically in the EHR inbox and replace paper.

## InLight EHR, Practice Essentials

The goal of Concierge Medicine is for physicians to enjoy their practice and give their patients the high-touch health care experience they expect. An EHR systems designed specifically for concierge practice has the potential to help a physician meets those goals, instead of holding them back.

At Pri-Med, we used our knowledge of Concierge Medicine to build an EHR system that meets the meet the unique requirements of this special type of practice. InLight EHR Practice Essentials helps you:

- Reduce needless clicks, improve workflow, and solve for cognitive overload with a breakthrough problem-oriented approach to information organization and presentation.
- Thrive financially with a hybrid approach to billing that includes both comprehensive management of retainer relationships and the ability to export bills and print insurance submission forms.
- Lower operating expenses and reduce downtime with cloud technology that allows for anywhere, anytime access.
- Operate a concierge practice more efficiently with integrated tools and interfaces for patient engagement, ordering and labs, eRX, and fax integration.

## To Learn More

You can start a free 45-day trial of the full version of InLight EHR Practice Essentials today. To learn more please call (844) 899-4448, or email [sales@inlightehr.com](mailto:sales@inlightehr.com), or visit [www.inlightehr.com/concierge](http://www.inlightehr.com/concierge).

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