

# PM, EMR and Portals: A Primer on Healthcare-specific Software for Ambulatory Care

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Few industries are currently changing as much as the US healthcare system. While many perspectives and ideas are shaping the debate on how to change the system to meet current and future demands, most believe that technology can and will have a huge positive impact on the ability of the industry to deliver quality care in a cost-effective way. Network technologies that can support the ubiquitous exchange of health information in a secure, efficient and collaborative environment hold the potential to streamline and modernize the current system to maximize resources and positive patient outcomes.

The opportunities for improvement have generated a lot of buzz in both the private and public sectors, and incentivizing adoption of Healthcare Information Technology (HIT) through the American Recovery and Reinvestment Act of 2009 (the ARRA or "Stimulus" bill) has led to considerable interest in an industry often known for lagging behind in the adoption of new technologies.

For many, the healthcare-specific technical jargon and operational knowledge of how healthcare works can be as complex as the products themselves. Here then are descriptions of the three types of medical software used by ambulatory care providers.

# ***Practice Management (or PM) Software***

Practice Management (or PM) software has been in wide use in the healthcare industry for almost three decades. Its primary use is the collection of patient demographics, patient insurance detail and the healthcare services and related diagnoses provided. This information is formatted to conform to payer requirements and is submitted electronically to request reimbursement for services. PM software also manages the responses from the payers in electronic format and invoices any balance to the patient in the form of printed and mailed statements. PM systems can be all-encompassing in functionality or can be a la carte in modules.

## **Functions of Practice Management Software**

- *Payer billing*
- *Patient billing*
- *Patient scheduling*
- *Patient recall for future appointments or services*
- *Referral management (inward and/or outward)*
- *Visit counting*
- *Patient eligibility and benefits determination*
- *RVU (relative value unit) reports for compensation by productivity*
- *Payer contract management*
- *A/R (accounts receivable) management*
- *Procedure / surgery estimating*

# ***Electronic Medical Records (EMR)***

# ***and Electronic Health Records (EHR) Software***

EMRs require and store some of the same patient information as PM software. Patient demographics, patient insurance information and scheduling are actually found in both types of software. When the two programs are integrated, one database typically serves both sides. While the PM system focuses on relating to the financial side of the practice, the EMR system organizes patient medical data.

Although the terms “Electronic Medical Record” and “Electronic Health Record” are used interchangeably by vendors and providers these days, the strict definition of the two terms provided by the Healthcare Information and Management Systems Society(HIMSS) defines an EHR as an individual record of a specific patient’s care, defining an EMR as the software platform that houses all of the EHRs the practice generates.

EMR systems are newer to and less evident in the outpatient healthcare industry. Tools to secure the system while making the data accessible, as well as installing hardware in clinical settings like exam rooms, are still fairly recent developments, especially for small to medium-sized private physician groups. As adoption continues, and the Federal government encourages entities to move to EMR, the interoperability of the software means a patient can easily and securely have records sent from one provider, healthcare system, or location to another – reducing mistakes and costs to inform providers and patients making decisions.

## **Functions of Electronic Medical Record Software**

- *Capture and reporting of discrete data*

- *Coding assistance*
- *Clinical visit summary*
- *pdf record repository*
- *Data aggregation in graphical form*
- *Access to patient records from other locations*
- *Medication reconciliation*
- *Patient recall for disease management or medication review*
- *Standards of care protocols / algorithms*
- *E-prescribing*
- *Data collection for interface with research or accreditation registries*

## ***Patient Portals***

While PM and EMR systems seek to capture and organize patient data to support the practice's operations and patient care, Patient Portals facilitate communication of sensitive health information between patients and care providers. Most Patient Portals are web-based systems that attach to the provider's website to allow patients to securely send and receive information.

By allowing more data to be transferred securely in a digital manner, patients can save time and effort communicating with their healthcare provider. Some patient care (eVisits or virtual visits) can take place via the Patient Portal, and organizations can save overhead and human resources on phone calls and in-person visits when replaced by secure emails or chats with nurses, insurance clerks, medical records clerks or lab technologists.

## **Functions of Patient Portals**

- *Online completion of patient paperwork – demographics,*

*insurance information, medical history, Notice of Privacy Practices (NPP) and other signatures necessary to receive care*

- *Online bill pay*
- *Medication/refill requests*
- *Appointment requests*
- *E-commerce – secure purchase of health products*
- *Secure email between physician and patients*
- *Online chat with staff*
- *Virtual Office Visits (reimbursed by some payers)*
- *Laboratory Results Communication*
- *Self-scheduling appointments*
- *Patient billing via secure email*
- *Online referrals (inward/outward)*
- *Exchange of patient records between physicians/providers sharing a patient's care*
- *Personal Health Record (PHR)*
- *Kiosk for patient check-in*
- *Patient submission of vital signs and other health data*

## ***Putting it all together***

All three types of software are designed to make information work for patients and providers without bogging down the delivery process with paper. By harnessing advances in network security, performance and usability, PMS, EMRs, and Patient Portals have the potential to make today's patient experience cost-effective, efficient, pleasant and safe.