



The Complete Guide On Upgrading To Modern Optometry Software



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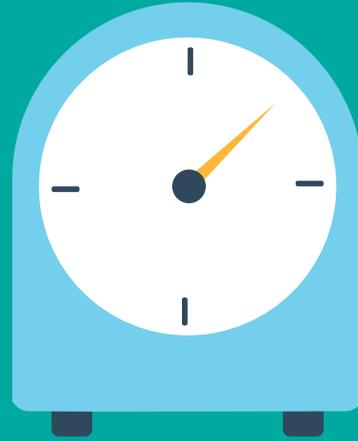
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Introduction

The thought of having to switch your EHR software may produce the same emotions as when a patient tells you that they haven't removed their contact lenses in over a week. ODs usually feel fear and frustration caused by the thought of potentially losing patient data, putting their staff through a software change, and continuing to run a seamless practice workflow while learning something new. But, it doesn't have to be this way.

In this eBook, we'll identify:

- Signs it's time to switch your EHR software vendor
- Benefits of switching to a new provider
- What you should look for in an EHR and PM solution
- How to successfully migrate to a new system



Knowing When It Is Time To Make A Software Switch

Knowing When It Is Time To Make A Software Switch

Your EHR and practice management solution connects you to your staff and your patients. Unfortunately, if your EHR software doesn't meet your practice, patient, and workflow needs, then you could be damaging patient relationships, impacting office productivity, missing out on revenue, and delaying practice innovation.

This is why it's important that you have the best optometry software for your practice. Let's look at a few key indicators that could reveal it's time for your practice to make a change.



Infrequent Updates

If you don't remember the last time your EHR provider updated the software, it's time to switch. Your practice and software needs to be adaptive to the changes in your patients, staff members, and the complexities in the eyecare industry. If your provider doesn't change with the optometry industry or offer templates to help you quickly adapt to your practice needs, then you may have to resort to homegrown solutions that are inefficient and error-prone.

If your software vendor provides updates, do you have to come into the office during your time off to install the update on each machine? Or, does the software update automatically for you? With a modern, cloud-based optometry software, you don't have to worry about being on the latest version or staying late to update each computer because the vendor handles the update for you, usually overnight without any disruption to your office.



It's Too Hard To Use

A complex navigation and user experience can make using and learning the system frustrating for your staff. It's also distracting to your patients when they can hear you clicking the mouse when switching fields or searching for the next window.

If the solution is too complex to use or is too difficult to train new hires on, then you could be putting your practice and patients at risk. Switching to an easy-to-use EHR solution that minimizes cumbersome navigation, decreases data entry, and offers an extensive library of training material could accelerate your office workflow to allow your practice to see more patients and increase your profits.



It's Server-based

Server-based EHRs are difficult and costly to maintain, take up a lot of real estate, can't easily keep up with constant changes in the industry, and can be vulnerable to data breaches due to home-grown network security configurations. If you're struggling to effectively manage a server-based EHR solution in your office, a cloud-based system can help free up office space and save you money on IT costs. Cloud-based software vendors manage their own secure servers to keep your data safe so you don't have to.

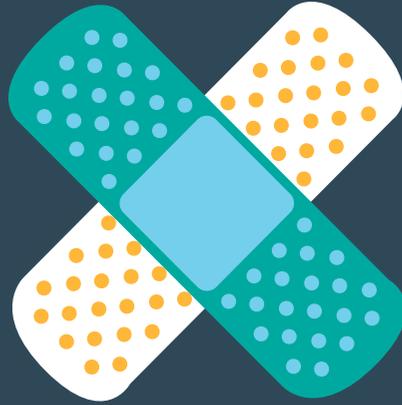


Hidden Add-on Fees

If your provider is charging you for features and services that should come standard, like support and training, or if your monthly bill is inconsistent without a clear reason, you might be able to save money by switching providers. Another hidden place you might be spending more money than needed is by purchasing third party add-ons for things like patient recall, patient education, code verification, frame catalogs, or ePrescribing that come built into some systems.

Common fees you may find hidden in an invoice include:

- Training fees
- Consulting fees
- Device integration fees
- Support fees
- Storage fees



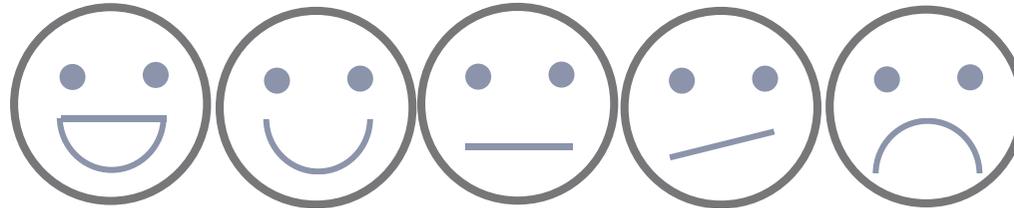
Assessing Your EHR & Practice Management Pain Scale

Not sure if your practice is ready to migrate EHR providers? Assess your current EHR pain scale by answering the questions below. For every “yes” answer give yourself one point.

- | | | |
|--|-----|----|
| 1. Is the user-interface difficult or time-consuming to navigate? | Yes | No |
| 2. Is the vendor slow to release new updates and fix bugs? | Yes | No |
| 3. Are there multiple add-on charges? | Yes | No |
| 4. Is their customer support team inconsistent in resolving your issues? | Yes | No |
| 5. Is the EHR missing any of the certifications you need? | Yes | No |
| 6. Do you personally have to manage the software updates? | Yes | No |
| 7. Do you have to perform backups so you can access the data at home? | Yes | No |
| 8. Are you juggling multiple software integrations? | Yes | No |
| 9. Are you just toughing it out because you’re scared of the hassle to switch? | Yes | No |
| 10. Does your EHR fall short of your practice's needs? | Yes | No |

Now, count the number of “yes” answers and use the score with the chart below to identify your EHR pain scale.

Number of “Yes” answers: _____



- 0-3 You’re in good shape!
- 4-7 Your EHR situation has some sting to it. Time to shop around.
- 8-10 Ouch, time to switch! Keep reading for tips on making a successful transition to your ideal solution.



Taking The Fear Out Of An EHR Software Migration

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Switching your EHR may seem like a hassle, but if you want to optimize your office workflow, schedule more patients, and improve staff efficiency, your EHR software needs to be designed for continuous enhancements that grow with your practice and the eyecare industry.

To take the fear out of the transition, this section lists the benefits you and your practice will receive when switching to a new, modern solution.



New and Improved Functionality

Technology is rapidly changing the landscape of your community and the industry. Your EHR provider should be offering new features and functionality on a regular occurrence to keep up with the changes in eyecare, technology, and government regulations.

Through continuous improvement, your optometry software vendor can ensure regular feature enhancements. Additionally, with a SaaS-based EHR solution, the updates to the EHR can be controlled automatically with minimal impact to your practice.



Consolidate Software Vendors

There's a lot of software your practice needs to run a successful and efficient optometric practice. Managing IT requirements, invoices, user names, logins, and training is time-consuming and error-prone.

Fortunately, a lot of the optometry software you need can be consolidated into a single solution to help you:

- Lower costs
- Decrease administration work
- Reduce risks
- Improve workflow



Gain Better Customer Support

Your EHR is the optometry solution that connects your entire practice to your patients. When something is wrong with your EHR software or you can't figure something out you want to deal with a dedicated customer support team that works with you to resolve any issues quickly at no additional cost to you.



Return on Investment

By consolidating software solutions, eliminating customer support costs, ditching server management fees, and increasing functionality to optimize your office workflow your purchase of a new EHR software could help you increase profits for your practice.



Learn how Dr. Stanley added \$21k a month in revenue using Uprise.

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Critical Features Every Modern Practice Management and EHR System Must Have

Critical Features Every Modern EHR & Practice Management System Must Have

We mentioned early on the benefits of consolidating your optometry software into an all-in-one, cloud-based solution. When beginning your search for a new EHR system, you want to choose a solution that offers the key features required to optimize the office workflow in your practice.

In this next section, look at the key features of a robust EHR and PM software and identify which features you would need, which features your current provider offers, and if it's an additional charge, the fee associated with it.

1

Simple Design

You and your staff have to spend a considerable amount of time working in the software every day, and for this reason it should be easy to use and visually pleasing. The design should mimic the way your office interacts with patients, and reduce data entry and duplicate work.

Look for a solution that was built by ODs so you know that design was influenced by someone who works the way you do. Customer-driven design helps ensure your feedback contributes to feature enhancements and updates.

2

Mobile Capabilities

Do you wish you could enter documentation without turning your back to your patient? Using a system that's accessible on tablets makes it easier to keep your eyes on what matters most. Plus, whether you're at home or on vacation you'll always have access to your system and patient data should the need arise.

3

Customizable Templates

There are going to be times where your practice will have to pivot between exam types quickly. For example, if the patient's exam switches from a spectacle exam to a contact lens fitting, you want to have the ability to make the pivot on the fly without losing any of the data you have already entered.

To minimize the effects this pivot will have on your workflow and patient schedule; you need to be able to configure exams, counseling materials, templates, and code mappings quickly to meet the patient's needs.

4

Clinical Decision Support

When you diagnose an issue, you want to make sure the documentation is accurate. With clinical decision support, you can make a single annotation in the EHR, and the software will populate diagnosis codes, treatments, orders, special testing, and patient education material based on eyecare industry best practices.

5

Patient Recall System

Gaining an efficient, affordable, and scalable method to reach out to patients about upcoming appointments could save your staff hours of administrative work. By automating your patient recall messages through an all-in-one system, your practice can increase patient retention while decreasing your staff's administrative workload.

6

Frame Catalogs

With an automatically updating frame database connected to your EHR and practice management solution, your practice has access to view thousands of frame listings and the ability to search your inventory and share images of frames with your patients.

7

Patient Portal

A built-in connection to a patient portal allows your practice to collect patient generated forms and insurance information before the appointment and maps it directly to the patient profile for future use. The patient portal also gives your patients the ability to manage their healthcare data, schedule appointments, and view education material when it is convenient for them.

8

E-Prescribing Tool

Embedded into your EHR, an e-prescribing tool provides an efficient way for your practice to manage your patient's medications and known allergies with instant notifications for when you prescribe a medication that the patient may be allergic to.

9

Patient Education Material

Educating your patient on a diagnosis is easier when using diagnosis-based patient education material that you can review with the patient in the exam room and then send it to the patient portal for them to review at their leisure. We're not talking just documents for reading, but videos and images to help patients better understand their diagnosis and treatment plans.

10

Code Verification Solution

Coding errors result in claim rejection and denials, hurting your practice's bottom line. Reduce coding errors using an EHR with code verification technology to ensure codes are accurate and compliant. Using built-in alerts, the code verification solution can inform you if codes are invalid or conflict with CPT or ICD codes.

11

Web-based Scheduler

Your solution needs to be flexible enough to tailor it to your practice needs while providing high-level information about the patient's payer eligibility, appointment type, and other patient details at a single glance.

12

Reporting Tools

Your practice is a business, and your optometry software should give you clear operational, financial, audit, and analysis reports to help you run your practice like a business. Use the reports generated by the system to manage deposit tickets, day sheets, product sales, and cash receipts.

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Claim Management Solution

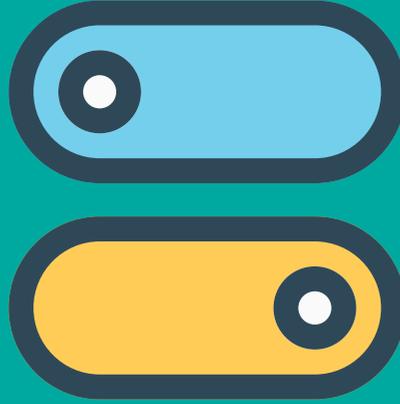
Finally, your practice needs to have your claim management software work with your EHR to connect your staff with thousands of payers so they can generate claims, post EOBs, and electronically submit claims all without leaving the EHR software.

To manage a claim effectively from the software, your biller needs transparency into each invoice. With a modern solution, your biller can track and gain transparency into the invoice to see codes, Rx orders, fee schedules, and the patient's order number from one dashboard to see the overall health of your claims management performance.

14

Checkout Tools

Managing the retail side of your practice may not be as easy as you thought. However, if your EHR software has checkout and billing tools, then you can process quotes and create, view, and edit invoices to reduce write-offs and improve aging accuracy.



3 Steps to Successfully Switch Software Providers

3 Steps to Successfully Switch Software Providers

The actual process of switching to a new software provider is the part a lot of practices fear, but if you have the right team to provide guidance and your staff is on board, then you will gain more functionality, lower your IT costs, and enhance patient care.

This section reveals three tips to reduce the stress of migrating EHR providers.



Get Staff Buy-in

Any change can be intimidating. When making a change to how your practice functions and completes day-to-day tasks, the adjustment may make your staff uneasy. While it's expected to be met with some resistance, you can lessen the opposition by bringing your staff onboard during the buying journey to help you understand how their role may be affected by the change.

Knowing how your team uses the EHR could improve your workflow, increase communication, and provide enhanced care for your patients.



Understand The Data

What data do you need to migrate into the new EHR? Working with your new EHR provider and their HIPAA-compliant partners, you can pinpoint the data you need to transfer, understand the data migration process, and learn how the new solution will store and collect data in the future. Most importantly, you need to make sure the migration will have minimal impact on you, your staff, your patients, and your daily operation.



Emphasize Training

No EHR works the same. Menus, functionality, and processes can differ between every solution. And, while some aspects of the EHR may produce similar results, the way they arrive at the result may vary. For this reason, it's essential that before you switch solutions, you confirm that the vendor offers robust training modules that meet your team's needs.

When training your staff:

- Utilize all available training resources
- Breakup training sessions into small segments
- Establish a training champion to track and motivate the team's progression



Navigating The Practice Management and EHR Software Migration Process [Your Checklist]

Optometry Software Migration Checklist



Assess Your Practice Needs

- o Identify your staff's software feature requirements
- o Identify your technology needs
- o Identify necessary office workflow enhancements



Evaluate Your Current Solution

- o Assess your practice management and EHR pain scale



Research Your Options

- o Research all available software options
- o Read online reviews
- o Ask a community of peers
- o Read vendor case studies and testimonials
- o Request product demos



Understand Data Requirements

- o Know the data you need to transfer
- o Learn how the new solution will store and collect data
- o Understand how long you need to keep a copy of your legacy data

Optometry Software Migration Checklist



Test The Incoming Solution

o Once implemented, work with the vendor to test the solution and verify that the software is working correctly and that it is recording data accurately



Train

o Use all of the vendor's training resources and enlist a training champion in your practice to ensure your team develops a working knowledge of the software



Go Live

o Use your new practice management and EHR software to improve your office workflow and enhance patient care

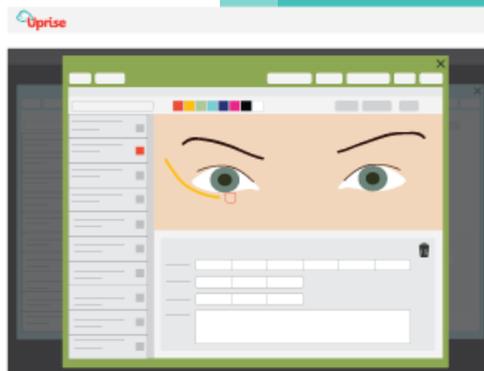
Conclusion

Your practice management and EHR solution connects you to your staff and your patients. That's why it's important that your optometry software meets the needs of your staff, your patients, and your practice. While migrating optometry software may seem challenging, if you partner with the right provider, you can easily move your practice to a modern solution that not only meets your needs, but also streamlines your workflow to increase your revenue.

What's Next?

Uprise is a cloud-based EHR and practice management software from VisionWeb, the eyecare industry's leading provider of technology solutions since 2000, that was developed specifically for optometric practices.

Uprise features a unique set of tools that provide optometrists with more flexibility in the way they work, more of the features they need embedded in the solution, and more control over the hardware they use in their practices.



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