
The Complete Practice Management Seminar™

Instructor's Handbook

Jack Valancy Consulting
Management for Health Care

12434 Cedar Road, Suite 2
Cleveland Heights, Ohio 44106
(800) 786-5225 • (216) 721-8990
Facsimile: (216) 721-6825
www.valancy.com
jack@valancy.com

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Introduction

Welcome to **The Complete Practice Management Seminar™!**

This Instructor's Kit will help you learn to:

- ▶ Identify essential topics
- ▶ Use a variety of teaching techniques
- ▶ Design conferences and other learning activities
- ▶ Assess residents' individual needs
- ▶ Document residents' experiences to meet accreditation requirements
- ▶ Choose curriculum resources

I encourage you to actively use **The Complete Practice Management Seminar™** Instructor's Kit. Your students will thank you for helping them learn useful practice management skills.

Why Teach Practice Management?

*"There is only one success-
to spend your life in your own way."*

Christopher Morley

Each physician faces the challenge of making decisions faithful to his or her ideals and consistent with his or her personal and professional values and goals. He or she needs to learn the skills necessary to make informed decisions that are right for him- or herself.

Medical education has traditionally given physicians clear direction and finite choices: Work hard in a good undergraduate premed program, get admitted to a medical school, select a specialty, and match with a residency program.

After residency or fellowship training, the freedom to choose among many different career paths and options can be intimidating. This is especially true today, as physicians face the disruption and uncertainties of turbulent change in the United States' health care system.

There is a clear need for training programs to develop and implement a practice management curriculum that meets the needs of their residents and fellows. Teachers face many challenges:

- ▶ First, the topics must have practical value to the physicians.
- ▶ The teacher must design learning activities to teach the topic.
- ▶ Finally, the teacher must present the topic to the residents.

Some institutions are fortunate to have faculty and staff members who can draw on their personal experience in practices who have the time to develop and teach a practice management curriculum. Unfortunately, many faculty and staff have limited practice

management background, have limited time to teach, let alone research, the topics, and design the curriculum.

Outside instructors have different limitations: Good teachers cost money, and are only available to the students for a limited time. Speakers who offer to present programs free may exploit the opportunity by presenting sales pitches for their products or services.

A working knowledge of practice management is very useful for physicians, whether they plan to enter private practice or choose another career opportunity.

The Complete Practice Management Seminar™ Instructor's Kit

I began teaching practice management to resident physicians about six months after starting my management consulting practice in 1979. At first, I lectured, and I'm afraid my early conferences were pretty boring. Before long, though, I was conducting *lecture-discussions*, which were considerably more interesting for everyone involved. Gradually, the practice management conferences became more interactive.

The lesson plans in **The Complete Practice Management Seminar™** Instructor's Kit start with lecture-discussions to provide an overview of each topic. You will also find:

- ▶ Panel discussions, in which practicing physicians and their advisors share their experiences.
- ▶ Workshops, in which the participants engage in hands-on cooperative learning
- ▶ Projects, which the participants develop individually and present to their colleagues
- ▶ Information exchanges, in which the participants share their own experiences, and record them for those who will follow.

Together, these lesson plans are a sort of cookbook for developing your practice management curriculum. The next section expands on the analogy of teacher as chef.

Good cooks use recipes as a starting point, which is how I'd like you to consider the lesson plans that follow. To encourage the exchange of ideas, I've set up The Practice Management Curriculum Exchange, an email discussion group for people who teach practice management. We share recipes and kitchen techniques for cooking up tasty practice management learning activities. To subscribe, please visit www.valancy.com or drop me a line at jack@valancy.com.

The Teacher as Chef

Some teachers serve a fixed menu of practice management to resident physicians, requiring them to attend rigid conferences and participate in various prearranged learning experiences at predetermined times. Other teachers set residents loose in the kitchen to nibble their way through independent studies in practice management.

Each approach has advantages and drawbacks. With the former, we can design the curriculum to offer a nutritionally balanced diet of practice management instruction in basic topics. We can even try to "force-feed" the residents by requiring their attendance. Of course, there is no

guarantee that the residents will digest much of the material, want to learn more, or enjoy the process.

Residents and teachers who are "picky eaters", pressed for time, or just not interested in practice management, often prefer the independent studies approach. However, there is the risk that the residents may not choose a balanced diet or, even worse, fill up on junk food topics.

A combination of these approaches usually works best. As teachers, we can help resident physicians learn by serving as their practice management chefs. We can cook a menu of balanced practice management learning experiences to meet residents' tastes and needs.

Just as a good chef plans and prepares nutritionally sound meals, we must help resident physicians plan and prepare for their careers. We should offer a framework for making career decisions, and information they can use to make the decisions that are right for them.

Plan the Menu

As a first course, you might begin in the fall of each year with one or more seminars on defining personal and professional objectives and goals. Supplement these with periodic individual conferences. Each physician's objectives and goals are likely to get more specific as they move through the residency program.

Start With a Balanced Diet

The experienced chef has fundamental kitchen skills that help him or her avoid problems while preparing any dish. Fundamental information and skills about significant practice management topics do the same for resident physicians.

You might want to do this through a series of conferences and learning experiences in an ambulatory care setting. Make a balanced presentation of significant practice management topics. Be careful not to fall into the trap of spending too much time on topics that interest you personally, while virtually ignoring others.

Satisfy Appetites

Some chefs like to focus their specialty, (like seafood, desserts, or regional food), while others like to try everything. Resident physicians are the same. Some might be very interested in just one topic (like negotiating an employment agreement, opening a practice, using computers in medicine, or understanding health care policy), while others want to learn about everything. We must be careful not to impose our preferences. Instead, we should be resources who help each resident satisfy his or her appetites, while assuring that they receive a balanced diet.

Periodic individual conferences with each resident to discuss his or her objectives and goals are a good place to plan elective studies and measure progress toward personal and professional goals. Sometimes, you will know a topic well, and can work closely with the resident. Other times, working with someone else will be best for the resident, or to work independently, and report with his or her findings.

Count the Calories

Be sure to record each resident's participation in the practice management curriculum. Keep track of the dates, the topics, the educational objectives, the learning activities, and the resident's time. You can only attribute hours to one special education requirement, e.g., you cannot count the same hour for practice management and, say, a clinical rotation in

orthopedics. Scheduled conferences and other timed activities may be used to fulfill the requirements. Independent assignments, such as preparing a report or independent reading may also be used.

The key point is that you must judge the number of hours reasonably necessary to complete the assignment. Supporting this judgment is easier if you require that the resident complete a written assignment, rather than just give an oral report. Completing the tests that follow each lesson plan for a topic overview conference also documents participation in the practice management curriculum.

Plan the Menu: Recipes for Success

Design your lesson plans as recipes for a conference or learning activity focused on one topic. You can obtain most of the ingredients you need from the resources listed above.

Organize lesson plans as follows:

- ▶ Topic: The subject matter.
- ▶ Educational goals: What the student is expected to do to show that he or she has learned about the topic.
- ▶ Activities: The teaching techniques the instructor will use to help the students achieve the educational goals and The tasks the student will do to achieve the educational goals.
- ▶ Hours of instruction: An estimate of the participant's time needed to complete the tasks in the lesson plan.
- ▶ Scheduling guidelines: When residents might be most receptive to this part of the practice management curriculum.
- ▶ Notes: The instructor's notes for planning the learning activity.

Planning a comprehensive practice management curriculum is like planning a menu for a week. You want to cook a variety of balanced meals. Just as you would review the suggested menus and recipes in a cookbook, spend a few hours reviewing your lesson plans to get an idea of the scope of the material. Then, outline the topics you would like to cover in your curriculum and select the corresponding lesson plans.

Planning a practice management curriculum to teach a particular topic is like planning a single meal. Just as you would turn to a section of a cookbook (such as meat, poultry, seafood, or vegetarian), turn to a particular chapter to find lesson plans on that topic. You may want to note optional learning activities and lesson plans on related topics.

If you need to fill the gaps in your practice management curriculum, or if you have a particular ingredient on hand, e.g., someone who is willing to present a conference on a specific topic, you might want to skim your lesson plans to find the one you need.

Timing is Everything

The ideal time to teach an individual topic is when the student is hungry for the information. For most residents, interest in practice management typically begins during the middle of the next to last year of training. Interest usually peaks when the resident signs an employment

agreement, typically toward the end of the final year of training. However, if the resident plans to open his or her own practice, interest in practice management continues to build through the completion of training.

Relying on the residents' level of interest alone to establish a schedule for teaching practice management can result in trying to teach too much in too little time. In a three-year residency program, you can present some practice management topics completely during the first or second year of training. You can introduce other topics during the first year, and presented in more detail during the second and third years. For residents in longer training programs, you might have more success if you schedule practice management during the last three years of training.

Be Prepared

To really learn the topic, both parties should prepare and participate in the sessions, so pay attention to the sections on resident participation and instructor's preparation. Just as preparation is important in cooking, a little bit of planning goes a long way toward making the topic interesting and useful.

If possible, ask the participants to read the relevant material in the handouts and other resources before the conference.

Prepare questions to stimulate class discussion.

If you have time, make the suggested assignment and schedule a follow-up conference for residents to present their work.

Testing both measures participants' knowledge and satisfies curriculum documentation requirements. Tests follow lesson plans for topic overview conferences.

Get Some Help

Try to invite qualified outside speakers to present some topics. The instructor's credibility usually increases with his or her experience. Besides, different chefs add variety. Here's who you can call on to help:

- ▶ Ask your program's faculty and staff Physicians, nurses, ambulatory care center staff, and others can present a practice management topic with which they are familiar. They can talk about a practice management function in your ambulatory care center, or in other practice settings.

For example, those with experience in private practice could share their knowledge and experiences. Faculty could tell about the advantages and disadvantages of academic medicine and how it compares with other career alternatives.

- ▶ Invite your program's alumni, preceptors, and attending physicians, and other physicians. Physicians the residents know have credibility. Your state and local medical societies probably can provide other speakers, as well. They can talk about evaluating practice opportunities, and their experiences establishing and running a practice, and professional relations.

- ▶ Ask your medical center's administrative and professional staff. Professional and administrative staff can talk about their specific areas of expertise, such as patient accounting or patient relations; administrators can talk about current issues in health care. Speakers can address physician-related issues both inside and outside the medical center, such as admitting procedures, including preadmission certification.
- ▶ Invite local business people who sell products and services to physicians. Resources include practically anyone who sells products or services to physicians: Accountants, attorneys, insurance agents, financial planners, people who run billing services, computer system vendors, suppliers of medical records and other office supplies, office designers. Health insurance companies and managed care plans can provide speakers, as well. You may even consider inviting physician recruiters.

Make it clear that the speaker is to give a balanced presentation on the agreed-upon topic, and NOT give a blatant sales pitch for his or her products or services. Understand, though, that the speaker is investing his or her time to generate business at some point in the future. Therefore, while you want to minimize any commercial message, you don't want to be so rigid that he or she declines your invitation to present a conference. Although this is a delicate situation, most people will respect your position if you state it clearly and professionally when you first ask them to speak.

- ▶ Arrange "hands-on" experience in an ambulatory care center Residents can learn by helping with a variety of practice management tasks such as scheduling appointments, preparing insurance claims, preparing bills, and processing medical records. Be sure to provide adequate supervision for this fieldwork, particularly if the task is critical. At team meetings, residents should discuss their experiences and may even suggest ways to improve operations!
- ▶ Arrange for observation at private practices With the permission of the physician(s), the resident can interview staff and observe operations to learn how they perform a certain practice management function in a private practice. After returning to the residency program, he or she can present a conference to share the knowledge gained in this fieldwork with the other residents.

What about honoraria and other compensation?

If you have some money in your budget, consider paying a small honorarium to speakers and others who donate their time to your residency program. If your funds are limited, you can offer to take them to lunch and pay their parking fees. Always write letters of appreciation to everyone who helps you with your residency program's practice management curriculum.

Turn Them Loose in the Kitchen!

If you can, arrange learning experiences outside the classroom: Turn residents loose in the kitchen and have them report on their findings to the other participants. Some residency programs encourage residents to actively participate in the management of an ambulatory care center. Others have residents prepare a written practice plan, such as an evaluation of a prospective practice opportunity, as a term project.

As noted above, written products make it easier to support the time attributed to practice management. The lesson plans suggest individual and small group projects that can be used to document experience.

Print a Menu

Inform the residents about the "who, what, when, where, why, and how" of the learning unit. You may want to announce and briefly explain it during morning report or another time when everyone is together. You may even want to post or distribute copies of the Lesson Plan. In addition:

If you are having a conference, be sure it appears on the residents' schedule and there are no conflicting events. Of course, serving food is always a good way to encourage attendance.

Valancy's Observation: Attendance is directly proportional to catering.

If a resident is going to do fieldwork in the ambulatory care center or a private practice, be sure to brief in advance the people with whom the resident will be working. This courtesy will reduce suspicion and increase the cooperation the resident will receive. Remind the resident that he or she will be a guest in the work area, and should behave appropriately.

Get Feedback

Ask the residents, speakers, and others to evaluate the conference or fieldwork. In particular, find out whether the experience was valuable to the residents and how they think you could improve it. Ask speakers and others whether the arrangements were satisfactory and how they think the conference or fieldwork could be improved.

Experiment!

Finally, do not be afraid to experiment. Like recipes, the Lesson Plans are starting points (At least that's how I consider recipes when I'm in the kitchen.) Feel free to adapt them to your own situation, the ingredients you have on hand, and your residents' tastes . . . change things, add things, delete things. Find out what works best. Bon appetit!

Jack Valancy, M.B.A.
Clinical Assistant Professor
Department of Family Medicine
Case Western Reserve University

Jack Valancy Consulting
Management for Health Care
12434 Cedar Road, Suite 2
Cleveland Heights, Ohio 44106
(800) 786-5225
(216) 721-8990
www.valancy.com
jack@valancy.com

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