Business Wellness Exam Access Requests

Introduction

The Business Wellness Exam (BWE) will assess every aspect of your business with high levels of granularity. We run this analysis through our data set of previous BWEs, MGMA DataDrive, AAPC, your Physician Organization (if relevant), and any other relevant systems. In order to examine your Practice, we need as much information as you're willing to provide.

Our BWE process has three components:

1. Preliminary data mining
2. On-site evaluation
3. Manual analysis

This access request is critical to oblige the first component of the BWE process. Please give us access to as many platforms, systems, and files as possible - this will improve our ability to perform subsequent steps. This information is kept confidential. If you don't have a system we're asking for or a file that we're requesting, just let us know. We classify Practices based on their region, Provider volume, and patient population - some classifications of Practices aren't expected to have robust CMS systems for marketing while others should. Traditionally, the longest part of the BWE process is waiting for clients to oblige this access request.

Please don't wait to send all of the information to us at once; instead, send each item as you can. Use this document as a checklist. If you'd rather we send you a form version of this document, we will happily oblige.

Once we perform our preliminary data mining, we will schedule your on-site evaluation. Depending on the Tier of your BWE, we may spend between one day to one week on-site performing this evaluation. The on-site evaluation verifies our preliminary data mining and helps to gather the information that cannot be gleaned from documents or systems. We'll interview a few employees, tour the office, observe some processes, and substantiate some assumptions. We do our best to be non-obstructive during the on-site evaluation.

The manual analysis combines our data from the preceding components into a master report. This report is reviewed by our department supervisors to verify accuracy and completeness. If the Owner(s) of the Practice would prefer to review this report before it is shared with the Administrator, please let us know. Our standard process is to present the report and our findings at the same time. Though we budget two hours for the presentation, we've found that many Practices like to discuss for four hours. Your entire strategic planning session for the year is likely covered by our BWE presentation so please allow for adequate time. We'd prefer to have the presentation off-site if possible.

Don't let this request for information overwhelm you. If you only grant us access to a few bits of information, we'll do our best to oblige the BWE process but the assessment will be limited. The more information you give us (good or bad) the higher quality the evaluation will be. The requested information shouldn't be considered a report card or an opportunity to be judged - the BWE is a constructive process for your own improvement. If you don't know what's broken, it's hard to fix it. If you know many things are broken, it helps to prioritize it - perhaps we can help with this prioritization as well.

External contacts

We can reach out to your partners to oblige requests for access, with your permission. Please indicate if you'd like us to contact them on your behalf. Regardless of your preferred order of operation, we'd like like to know who the primary contact is for each of the following roles:

- CPA
- Bookkeeper
- IT Vendor
- Marketing Vendor
- ACO(s)
- Physician Organization
- Payroll Company
- Billing Company
- Audit Partner
- Call Center

Critical Access Systems

These are systems that will provide the greatest insight into your Practice; therefore, we ask that you give us access to these systems with the highest level of access that you're comfortable providing.

- Co-administrator access to your EMR and PM system(s)
- Access to your bookkeeping platform
- Access to any compliance software
- Access to your payroll system
- Access to your timecard management and scheduling system
- Access to your marketing software, CRM, and patient notification system

Helpful Systems

If you are capable, please give us access to these systems. If you don't have these systems, please let us know. We'd be happy to show you how these systems (manual or outsourced) can make your Practice more efficient.

- BAA Registry system
- Access to your website
- Access to your security tracking system (minimal access)
- Learning Management Systems (such as HIPAA, OSHA, training systems)
- Template repositories such as new patient forms, letterhead, and informed consent forms
- Server access and standard Windows/Linux/Chrome enterprise Active Directory (or equivalent)
- Remote access to a computer in the office
- Access to your Google Analytics, Google MyBusiness, Google Search Console, and Google Tag Manager accounts (minimal access)
- Accounts payable system
- Inventory Management System
- Phone System

File Requests

You can either email the files to us or we can provide you with a HIPAA-compliant 'Uploader.' We'll use whichever platform you prefer to exchange documents but we've found that email or Uploader are preferred. If you'd like us to create an Uploader for you, let us know and we'll customize one for your Practice.

- Employee Handbook
- Policies and Procedures
- PCMH Guide
- Job Descriptions
- Notice of Patient Privacy Rights
- Recent OSHA Audit
- Past 2 Security Risk Assessments
- Digital copy of tangible materials such as brochures, business cards, and letterhead
- Branding file (font, palette, and logo)
- Process maps, guides, or any other process management documents
- Patient newsletter, referral network newsletter, or any other periodic communications
- Facility security log (one quarters' worth)

- Your defined referral network
- Any chart audits, coding assessments, or formal audits
- Staff, patient, and provider onboarding process
- Credentialing Master File (minimal access)
- 3 HR Charts
- Copy of your last 2 billing and/or executive reports for the Owner(s)
- 3 Clinical Flowsheets

Additional Information

We could ask for all 200 systems, documents, and files that we assess for each group or you could give us what you think would be relevant so that we can access your:

- Compliance
- Marketing
- Finance
- Billing
- Information technology
- Workflow
- Clinical process

Preliminary Q&A

- Which EMR do you use?
- How long has the Practice been in business?
- Which incentive programs do you participate in (PCMH, AHA, CPC+, PQRS)?
- Could you please provide us with a picture of your IT closet as detailed as possible?
- Which document management system do you use (GSuite, Microsoft Office Suite, Zoho, nothing)? Can you grant us temporary access to the administrative backend of this system?
- How many employees do you have? What are their roles?
- Who should be our primary point of contact?
- Do you have any concerns about this process before we get started?