



Eliminate Admin:

# Layer HIPAA-Compliant Medical Communication Technologies

## The Background

Tasks like fielding calls and contacting insurance companies, along with setting up new clients in an EHR, takes time away from patients for hours every week.

## Our Goal

Discuss how layering HIPAA-compliant medical communication technologies can virtually eliminate admin for your medical practice.



## Discover How To

1

Remove yourself from the frontend and backend processes that take up so much of your time.

2

Maximize consultation time with patients and give them the care and attention they deserve.

3

Leverage Spruce communication as a vital tool to scale your practice in no time.

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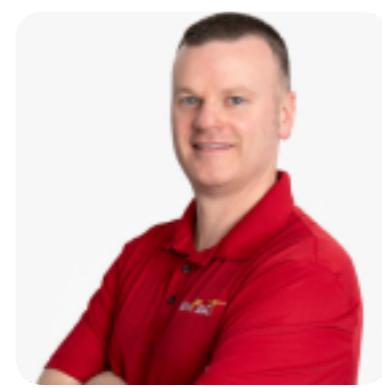
# Eliminate Admin:

## Layer HIPAA-Compliant Medical Communication Technologies

# Introduction

Let's talk about how layering HIPAA-compliant medical communication technologies can virtually eliminate admin for your medical practice. Pun intended!

We all know that tasks like fielding calls and contacting insurance companies, along with setting up new clients in an EHR, takes time away from patients for hours every week.



That's why we sat down with Impact Physical Therapy, an outpatient physical therapy practice specializing in orthopedics, to learn firsthand how they employed a medical communication platform (Spruce!) along with virtual assistance to offload their admin: the answering of phones, patient scheduling, and verifying of insurance, to name a few tasks—while at the same time scaling their practice and maximizing time with their patients.

This paper will delve more deeply into the highlights of a recently published case study that speaks to the challenges the practice faced along with the solutions that were employed and the outcomes that were enjoyed. You'll learn how Impact Physical Therapy was able to transform their business in a matter of months during the height of the pandemic and grow their practice exponentially.



# What is Impact Physical Therapy?

Marc Plawner, PT, Cert. MDT, and Christopher Lang, PT, Cert. MDT, DPT, SCS, co-founders at Impact Physical Therapy, established their practice at the start of the pandemic in 2020. Their primary goal for launching at that time was to provide the local community with a superior rehab experience focused on one-on-one, manual-based therapy, functional exercises, and evidence-based treatments delivered by highly skilled and effective therapists.

## What is Impact Physical Therapy?



A practice designed to help patients achieve wellness and recovery goals so they can get back to living the life they enjoy. Impact evaluates patient's symptoms and discusses medical history along with any health constraints before establishing an action plan for the path to recovery.

Active Release Technique (ART)	Blood-Flow Restriction
Cupping	Fall Prevention
Functional Movement Screen	Golf Performance (TPI Certified)
Graston Technique	IASTM
Kinesio Taping	Manual Therapy
McKenzie Method	Orthopedic Physical Therapy
Physical Therapy	Return to Sport
Sports Performance	Therapeutic Exercise

Their core mission is to improve the health and well-being of the community through a patient-driven treatment model by honing in on each patient's individual needs, improving their awareness and understanding of the injury or condition, and providing undivided professional attention during every visit to ensure uninterrupted rehab progress and maximum results.

That can only be achieved if Marc and Chris aren't inundated with administrative overhead.

**Marc and Chris started this practice for patients to receive the highest quality care from therapists who are given the resources and time to deliver it.**

# What is BBC Global Services?

BBC Global Services is a HIPAA-compliant virtual assistance and supplemental staffing firm designed for emerging and medium sized businesses who are either unable or not yet ready to bring on full-time staff. Founder, Mike Yablonowitz, launched BBC Global Services in 2017 and his team enables practices like Impact PT to outsource administrative and receptionist tasks with professional HIPAA-certified virtual medical assistants. They provide structured supervision—virtual assistants (VAs) are never left to their own devices—and assistants learn the unique ins and outs of every business so that they can speak to the products and services as fluently as full-time staff. That's ultimately why Impact chose to work with BBC.

## What is BBC Global?

### Virtual General Administrative Assistant

Free your practice of back office details and give your staff room to serve your patients first. Our general administrative virtual assistants can handle anything from billing to referrals and much more with the professionalism and expediency you would expect from your in-house staff.

### Benefits

- ✓ All virtual assistants are HIPAA compliant.
- ✓ Real-time verification of benefits, so you can serve patients first!
- ✓ You save time because of increased efficiency.
- ✓ You save money because time-consuming tasks are outsourced.
- ✓ Avoids claim denials and rejections when patient eligibility is verified.
- ✓ Improved communication with patients.
- ✓ Higher levels of patient satisfaction.
- ✓ No contract — can leave after first 90 days.
- ✓ Structured supervision for VAs.
- ✓ Weekly reports, so you always know "What did my VA do this week?"

Keep yourself and your staff focused by outsourcing administrative and receptionist tasks with professional HIPAA- certified virtual medical assistants.

### Fast Facts:

- The BBC call center is staffed 24/7. Clients may have a full-time staff or a half-time staff.
- A BAA is signed between BBC and the practice.
- All virtual assistants work from a call center so that BBC can manage HIPAA compliance.

# What is Spruce Health?

Spruce is a healthcare communication platform designed for medical professionals and easy HIPAA-compliance; consolidating communication channels, including business phone, fax, text, and telemedicine into one unified, cloud-based solution. Spruce is both mobile and web friendly and makes it simple to communicate with patients and providers from wherever you are.



The image you see here is a visual representation of what Spruce does and gives you a firsthand look at the interface, which is nearly identical across devices.

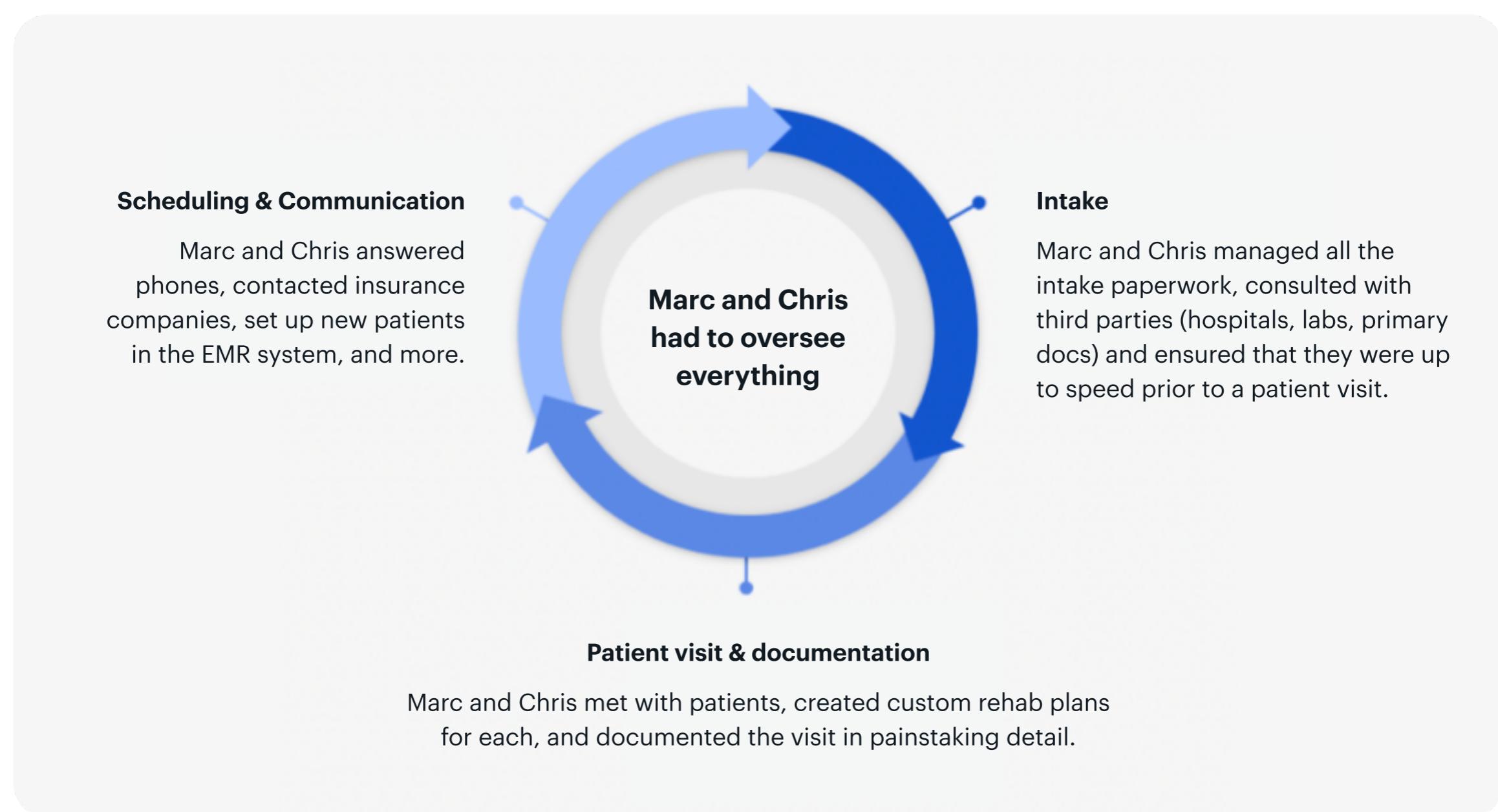
We have collectively seen a huge uptick in practitioners and clinics using virtual assistance on top of Spruce as a stopgap for on-premises staff and reduction in admin overhead. Our interest is in sussing out the reason for the uptick and learning if the solution is working long-term. Read on for results!

# Deep Dive into Impact Physical Therapy Case Study

The case study published earlier this year speaks at a high level to the challenges that Marc and Chris faced when they first launched their practice and the steps that they took to overcome them quite quickly.

## Primarily, they were faced with:

Overcoming their lack of frontend and backend administration. Like any new business, the guys had to start lean before they could justify hiring more staff, and that meant tackling pretty much everything themselves. Unfortunately, the DIY approach meant that they were on the hook for everything, from fielding calls and contacting insurance companies, to setting up clients in their EHR system, and this took them away from their patients for hours every week. Obviously that model wasn't going to be sustainable.



As this flywheel indicates, there was no way Marc and Chris could continue down this path for long. As you can see, Marc and Chris were answering phones, contacting insurance companies, and setting up new patients in the EHR system. They were also managing all the intake paperwork, consulting with third parties (like hospitals, labs, and primary docs), and ensuring that they were up to speed on the critical details of each patient prior to a visit. But let's not forget their actual jobs! Marc and Chris were meeting with patients, creating custom rehab plans for each, and documenting the visit in painstaking detail.

# Question & Answer

## **When did you realize you weren't going to be able to continue doing everything yourselves?**

When we first conceived of starting a clinic, it was back in 2018. And we were going to do it the traditional route, where you rent space and set up shop. Due to some delays on our side, we weren't really ready to ramp up and launch until Spring of 2020. And at that point, things had drastically changed, primarily due to the pandemic. We realized that we couldn't just leave our jobs, so that meant taking on a new part-time job, if you will, in the form of our practice. We were working, and then during our free time, or "spare time," we were credentialing or handling new patient intakes and all the other stuff that comes with a new business. We realized pretty quickly we couldn't do it all ourselves.

## **How did you figure out what you would need to add to your technology and software mix to offload all this busy work so you could focus on caring for your patients?**

We started researching (a lot) and looking for an application or some type of phone service that could offer us the ability to fax, email, create internal messages, and so forth. Ultimately, we needed to be mobile, so we were looking for a solution that could facilitate these actions from our phones. The idea of buying an expensive phone system just wasn't part of what we were able to do at that time. So, we started searching around and looking at different options. We read a lot of blogs and eventually came up with a list of different vendors and suppliers to review. We were interested in Spruce at that point because Spruce offers messaging, fax, email, phone calls, and so forth, and you can do it all from a central number—from your phone or computer.

## **Question: How did you know that the kind of application you were looking for truly existed?**

We didn't. The first thing we needed to make sure of was that the solution was compliant. Originally, we were going to get an 877 phone number with Grasshopper. But after doing a lot of research, we realized Grasshopper was not an option for us.

# Question & Answer

(cont.) At that time, we had some experience with remote solutions from having worked with a practice that was nearly completely virtual. They used an internal communication app to streamline things from patient intake all the way to discharge. And there were different communication modes for doctors and patients. So that was something that we were really interested in—the ability to tether all our different communications centrally, and organized by patient. Finding the right HIPAA-compliant communication system would enable us to collaborate as a team and communicate securely with patients and doctors quickly and easily. That's what sold us on Spruce. We realized we could send calls to voicemail during patient visits, utilize auto-replies for incoming messages, create saved messages that we could use time and time again for similar inbound questions, etc., which helped us to focus on the real work at hand, helping our patients.

**Question: How did you decide to roll this out before virtual assistance or before adding a part-time assistant to your staff? How did you figure out what came first?**

In the very beginning, we were both transitioning out of other jobs. So we were working other jobs simultaneously. When we started our own practice, it wasn't very busy early on. It wasn't a huge need to go out and find someone to employ in a location that didn't even really exist. We started by subletting a small space in a fitness center not far from where we are now. And because we weren't terribly busy, it didn't make sense for us to look for employees. So, we were able to handle the administrative tasks along with the physical therapy work that we do, but then as things started to ramp up, it became pretty evident fairly quickly that we were going to need help. It was very time consuming. The length of time it takes to manage an initial phone call that comes in, if you're lucky enough to be available to field that phone call in the first place, could be 5 to 10 minutes gathering their information—insurance, demographics, type of injury, etc. And then you have to follow that up with a phone call to an insurance company, which can take anywhere from 10 minutes to 45 minutes. It was just extremely taxing timewise. And so we realized pretty quickly that we needed some help.

# Question & Answer

**Question: Out of the gate, did Spruce help you manage your patient care better, or was the immediate benefit more a reduction in the busy work?**

I (Marc) was still working in a busy hospital system, which is a lot like working in a busy clinic, and I couldn't pick up the phone and have conversations around my colleagues at the time, to onboard patients for the job that I was planning on eventually going to. Spruce enabled me to communicate through the app without having to actually talk to the patient out loud. Additionally, I could ask them to send me pictures of their photo ID and insurance card. So that eliminated the need for a very lengthy conversation.

I had pre-saved messages within Spruce that I could tap into really quickly to send the messages that I was redundantly sending. That's why Spruce was very, very helpful early on. Ultimately, Spruce made a lot of the upfront process and transactional work much more efficient. But, even still, we were handling a fair amount of the admin ourselves. And that was the catalyst for adding yet another layer, a virtual assistant.

**Question: How did you realize virtual assistance was the next step to streamlining your business?**

Once we opened up the doors here, we had to almost block time out to do the administrative stuff. But we also wanted to make sure that most of our clinic, approx. 1600 square feet, would be dedicated to treatment space. We wanted to limit any type of administrative work to zero inside our clinic, and we figured that it could be tackled remotely—also saving us money.

Additionally, once we had our own space and began getting more patients, there were times where we had to literally stop a treatment to field a phone call. Or, if somebody happened to walk in, we would speak with them for a few moments, again interrupting treatment, and it just got to be too much to handle. Add to that, we were still making those phone calls to insurance companies, which unfortunately can be very time consuming. So while our goal was to provide very high-quality, hands-on care, the administrative burdens were making that tough to do without assistance. And then, on top of it all was the climate. We were still in COVID and there were a lot of things going on. For instance, it was almost entirely impossible to find anyone to work for us. We did some interviewing and people were no-showing! We began hearing about certain organizations that began paying people just to interview for open jobs! So, we very quickly realized that we would have to find some type of staffing agency. That's when we started looking around and we weren't just looking domestically. We did a lot of research.

# Question & Answer

**Question: Did you evaluate other virtual assistance solutions? How did you find out about BBC in particular?**

We interviewed a whole bunch. And, like with anything, we just liked what we liked. We were going through a lot of growing pains and taking on a tremendous learning curve, and we needed a service that really understood the evolution of our practice, and could grow with us and not leave us in the lurch. We needed to know that if our dedicated assistant was unavailable or had to take a day off, that we would have coverage. So that was the biggest thing, we didn't want to not have coverage or not have support. And then there's the training modules—we needed to be sure that if a backup came in, there would not be a tremendous learning curve for that person. We were very sensitive to the staffing headaches of someone not showing up or not knowing what to do.

When we first introduced our VA to the business, we created and documented certain protocols so that they would know what to do in every scenario. That playbook ensured consistency if the primary VA were out sick or out of office or on vacation, because someone else could pick up that playbook and easily step in.

**Question: What was it like onboarding your VA? How long did that take?**

Our type of practice was totally new to our assistant. And since we were pretty new to it ourselves, we had a very clear understanding of how to come up with a complete playbook of what the processes were. So we created this manual that covered the nuances of the business—right down to the unique insurance scenarios that could come up. And we were training her simultaneously as we were creating this manual for her reference. It took a couple of weeks before we collectively felt comfortable enough that she could start answering phone calls. But there was a lot of Q&A back and forth, specifically if there was a scenario that she wasn't familiar with. So we were communicating consistently through Spruce with her. It probably took about three weeks, from start to finish, before she became quite skilled and adept at fielding various types of scenarios.

**The virtual assistance component was tightly integrated with Spruce so that the team could review updated EHR data and phone and text threads each day, from wherever they were, and in a HIPAA-compliant manner!**

# Question & Answer

## Question: How is HIPAA compliance handled on the virtual assistance side?

When people get to the office, they check their phone into their locker. There are no phones on the floor. There is smoked glass separating the HIPAA-compliant area of the office from the general assistants. From a more technical standpoint, Active Directory is employed for passwords, and monitoring software is used for workstations. There are security officers on staff, and we have a third-party audit company that manage the entire process.

## Question: How were you able to scale your practice so quickly?

With the administrative tasks off our plates, we had plenty of room on our schedule for new patients. Now that we had someone fielding phone calls from patients, making outgoing phone calls to insurance companies, calling back patients to go over their insurance benefits after the inquiries were finished, scheduling them, and then inputting them into our EHR, we were able to start filling up our schedule, because all we were doing at that point was the PT component of our work.

## Question: How do people know to download Spruce when they start with you?

It actually occurs on their initial phone call. When a new patient calls up, our VA is trained to ask the patient if they have a smartphone and if they're comfortable downloading a HIPAA-compliant communication app. She can then send the new patient a message that welcomes them to the practice with some instructions. After that, the patient will send pictures of their driver's license, their insurance cards, and their doctor's prescription. That is saved and uploaded directly into the EHR, which is helping us to remain almost 100% paperless. Our VA communicates with the patient on Spruce once she has verified their benefits, and any dialog is captured for us to review at the end of our day. We have patients that are constantly texting. If you're the type of clinic that really wants to drive patient care and really show patients that you're there for them, this is the way to do it. We may have people texting us on Sunday, and we text them back. We're trying to do right by them, which is our whole mission. That's the reason why we got into this.

Even if you're working with a patient that is not tech savvy or maybe has an outdated flip phone, you can still create a patient profile in Spruce and use it internally to track visits, notes, treatment plans and more—from initiation to discharge. It provides us with a track record of the entire patient journey and it's very easy to search for things that were done in the past because everything is time and date stamped.

# Question & Answer

## Question: Does your VA log into your EHR?

Our VA has her own login and account for the EHR, which enables her to create new patient accounts and schedule them. She has our schedule up in front of her the entire time that she's working. So the playbook we created includes a fair amount about how to navigate through the EHR as well.

## Question: How are you handling phone calls when your VA is based internationally?

Our VA has a Google Voice number. Our Spruce number is diverted to her Google number for her to pick them up. She places outbound calls directly from her Google number.

*Note: this is a terrific workaround for international patients, too. Here is an [article](#) that reviews the logistics of setting up a Spruce account without a 10-digit US-based phone number. Spruce is also able to ship physical desk phones to the Philippines or to wherever a virtual assistant is located. And they can just use the phone to pick up and make and receive calls. So that's another option for a practice in a similar position.*

## Question: How do you manage inbound calls?

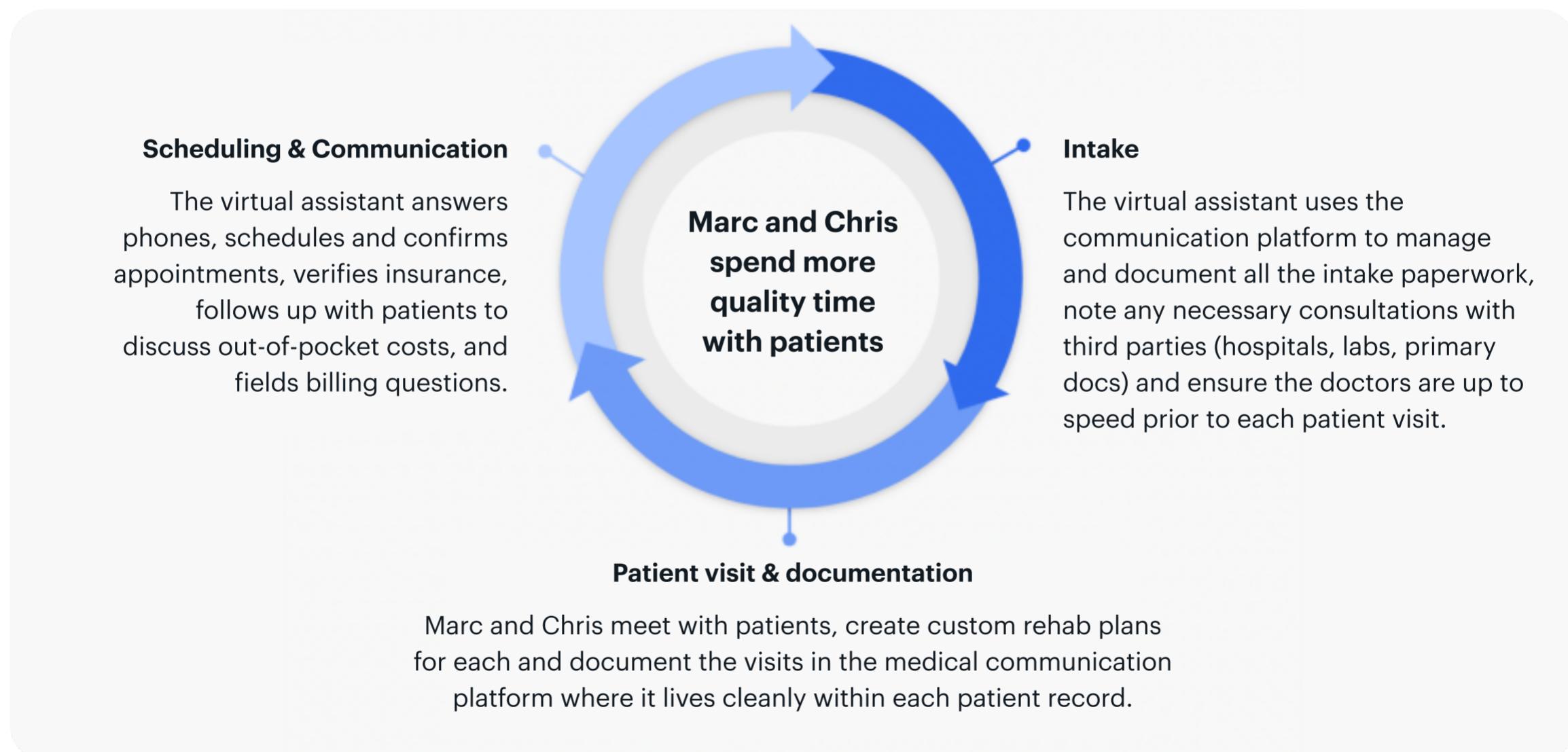
We have set up a phone tree. The first thing that happens when somebody calls our number is that they have a menu of options to choose from. There are some situations where we might want a call to be forwarded directly to the office and bypass our VA. And that's really for people who have questions about the services we offer, that she may not be able to field if it's specific to PT, as she's not a clinician. If it's a new patient looking to schedule an evaluation, or if it's an existing patient calling just for scheduling needs, those phone calls will get forwarded directly to our VA.

All phone calls are documented within Spruce and if a fax comes in, we can take that fax and either copy it and bring it right over to the patient's thread or we can create a link. So let's say for instance, a fax comes through with a plan of care for a patient and it needs to be signed. It can be faxed through Spruce, and then the link can be copied and dropped into the patient's thread. We also found that we can connect that same document to our EHR, which makes everything much more efficient. And, we gave our billing department access to Spruce so that they can add eligibility, benefits information, and authorizations to patient threads, which integrates nicely from that perspective as well—all on the back end.

# Measurable Outcomes: Greater Efficiency, Better Patient Experience, Sustainable Growth

- Marc and Chris were able to remove themselves from the frontend and backend processes that took up so much of their time.
- The team maximized consultation time with patients and gave them the care and attention they deserve.
- Impact Physical Therapy had set a goal of adding three to four new patients each week. In early January of 2022, despite the Covid surge and cold weather, they welcomed 10 new patients in one week.

The flywheel below is pretty telling, as after implementing Spruce and BBC, Impact was able to have their phones answered, appointments scheduled and confirmed, insurance verified, and follow-ups with patients totally covered. The virtual assistant used Spruce to manage and document all the intake paperwork, note any necessary consultations with third parties (hospitals, labs, primary docs), and ensure that both practitioners were up to speed prior to each patient visit. And the best part, they could both meet with patients, create rehab plans, and document communication, collaborate, and respond to patients quickly—all within Spruce.



Marc and Chris were very active in the beginning of the onboarding process and because of that, their virtual assistant got good feedback. It would be the same as if you brought someone into your office to work with you to learn the process. If you're going to be available, it's going to go quickly. If you're not going to be available, it's going to go slowly.

# In Conclusion

Impact PT found incredible benefits from layering virtual assistance on top of their medical communication platform and EHR. It virtually eliminates the guesswork from day-to-day documentation, administration, and communication with patients and third parties. It also enables them to focus on the task at hand: helping patients get well.

Reach out to us at [support@sprucehealth.com](mailto:support@sprucehealth.com) if you'd like to learn more about how Spruce can optimize the way you work today. Or, just try it for yourself with a 14-day free trial: spruce.app/io.

## Resources:

[Spruce Health](#)

[Spruce Health Blog](#)

[BBC Global Healthcare Virtual Services](#)

[Impact Physical Therapy](#)

[Impact Physical Therapy Case Study](#)

Thanks for reading!

“This powerful combination of solutions has helped us achieve our vision for providing high-quality, unrushed care while growing our practice.”

—Chris Lang, Co-Founder, Impact Physical Therapy