



Going with the Flow: Solving Workflow Problems

by Reuven Lirov, M.A.

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Expert commentary by Lauren Gonzalez and Mary Kennard

Pointing Fingers

How can Alex handle office management problems?

“Could you please just focus on this one task until it’s done?” Alex snapped at Luisa, his office manager. “It seems as though nothing ever actually gets finished around here lately.”

Luisa set her mouth in a determined line. “Yes, Doctor,” she said icily.

Alex liked a happy office, but he also felt that he was right. He decided to push for resolution on the issue. As a mental health practitioner, he reminded himself, he had the skills to get through an unpleasant discussion when it needed to be done.

“Do you understand my concerns?” he asked.

Luisa was silent for a moment.

“I understand that you need the billing kept up to date,” she said at last. “I understand that we have a backlog of paperwork, and some things have gotten lost or deadlines have been missed. I also understand that mistakes like that affect our profitability as a practice.”

Alex smiled. He was pleased that he had been able to help Luisa see the problems more clearly.

“What I don’t think you understand,” Luisa continued, “is that I run this practice by myself. This is probably the longest discussion you and I have had all month without being interrupted by the phone, and I’m the one who answers it. I’m also the one who does the scheduling, the billing,

the required paperwork, the coffee, and watering the plants!”

Alex began to respond, but Luisa cut him off.

“Plus, you always say to put patients first, so I spend hours every day answering questions, responding to emails, and chatting with patients. How am I supposed to get everything done?”

“We’ve had other staff in the past --”

“The last helper we had was a single mom who took classes as well as working. She did her homework instead of paperwork and was constantly out because of problems with her kids or her babysitter. And that was months ago -- we haven’t even replaced her yet.”

Alex remembered all the other office staff they’d had over the past couple of years. Staff turnover was often a problem in mental



health care practices, he knew, and Luisa had complained before that helpers left as soon as they got trained well enough to be really helpful.

“I owe you an apology for that,” he acknowledged. “I’ve had so many things on my mind that I haven’t really thought about hiring someone new.”

The phone rang.

“I have to get that,” said Luisa. “I’m sorry about the backlog and the errors and I’ll try to do better.”

As she spoke with the caller, Luisa’s face went from a stony mask to a friendly smile -- or, thought Alex, could it be a friendly mask? He knew he was lucky to have someone like Luisa managing his practice and he didn’t want to lose her, but he also knew that they couldn’t continue the way they were going. They’d have to find more help -- and that meant more time and more money, and who knew how many tries it would take before they found someone useful?

Blue Skies from Now On?

Will a change of perspective solve the problems Alex is facing in his practice?

“She’s just so unreasonable!” Alex fumed, shoving his hands deeper into his pockets and staring at his feet as he walked.



“Alex,” his wife objected, “if you don’t slow down I won’t be able to hear you, and then how can I sympathize?”

Alex slowed down by a fraction. “You do sympathize, I hope. We have problems in the practice with office processes, and it’s getting in the way of my work. It’s that simple.”

“So what exactly is the issue?”

“Costs, first,” Alex said firmly. “When we have errors in billing, we have claims denied or delayed. When billing issues are handled badly, we can even lose patients.”

“That makes complete sense,” said Laura. “Are you noticing these gorgeous views at all? Look how pretty the sky is!”

“Yes, yes, very nice,” grumbled Alex. “So there’s the issue of cost. Then there’s also compliance.”

“A big deal in a mental health practice,” said Laura.

“Exactly! We can’t have incomplete documentation or incorrect codes!” Alex stopped suddenly. “We can’t let things slip

through the cracks!”

“You’re absolutely right,” said Laura. “Let’s turn around and go back.”

“I get the feeling that you’re humoring me,” Alex said, “but it really is a serious issue, and I don’t think Luisa is taking it seriously.”

“I’m not humoring you,” Laura objected, “but I did feel as though you needed to get all that off your chest before you could hear what I have to say.”

“And what’s that?”

“Haven’t you told me lots of times how very soon now you’re going to get new computers, or some more modern software that will make practice management easier?”

“You know I’ve needed to be careful with the budget lately. I’m not spending on any extras.”

“Sure, but if that means that Luisa is working with outdated tools and inadequate help, it’s just possible that it’s not entirely her fault.”

Alex nodded. He had to admit that his low-tech office made the work more labor-intensive than it might otherwise have been. They had reached a hill, and he could feel his body beginning to relax as he leaned into the climb.

“I’m not saying that it isn’t serious,” Laura went on, “and you certainly have a big job. You have to manage everyone and

everything and you don’t have time to watch for every little mistake and still take care of your own clients.”

Alex nodded as Laura stopped for a moment to catch her breath. “I think it’s possible that the problem isn’t Luisa. The problem is the mistakes and the way things get missed, and that might not really be a problem with Luisa.”

Alex looked intently ahead.

“Are you taking time to admire the view?” asked Laura, following his gaze.

“Actually, I’m admiring that restaurant up ahead,” said Alex. “You’ve helped me gain perspective on this, and I think maybe you deserve a meal.”

Back to Basics

What’s the real foundation of Alex’s practice management issues?

“Can you come into my office, Luisa?” Alex tried to smile, but he saw Luisa’s mouth tighten. They’d gotten back to business after the heated discussion they’d had on the subject of office procedures, but Alex knew that the stress was still there.

As the head of the practice, he had a responsibility to keep the office on track, even if it wasn’t always comfortable to talk about problems.

On the other hand, he also wanted to keep morale high -- and he certainly didn’t want to lose Luisa. She had been his right arm since he had opened his mental health practice.

He held the office door for her. She perched on the edge of a chair and gazed around the room, as though she hadn’t seen it thousands of times before.

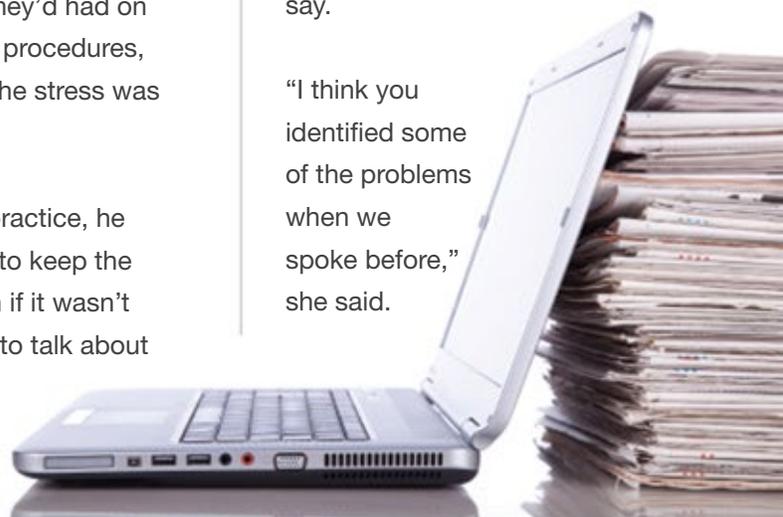
“I don’t feel that we solved the problem in our discussion the other day,” Alex began.

Luisa said nothing.

“This isn’t about blaming you for problems,” Alex assured her. “I think we got some clarity on the problems in the practice, but that doesn’t say anything about the sources of those problems or the best solutions. Together, we can identify the issues that need fixing, and come up with a list of changes that need to be made.”

Alex could see Luisa relax. She still looked upset, but she heaved a sigh of relief. He wondered what she had been worried he would say.

“I think you identified some of the problems when we spoke before,” she said.



“The high turnover in office staff, especially when there are gaps between when one person leaves and the next one begins, and of course the times when work doesn’t get done at all because someone is absent... All those things, I think, come down to knowing what to do.”

Alex was surprised. Luisa seemed very knowledgeable, and he thought that she was good at explaining tasks to the other workers.

“It takes a while for new people to understand all the different parts of the job, and of course all the training goes on in a busy office,” Luisa continued. “Sometimes I’m too busy to explain things, so I do it myself, and sometimes team members develop their own systems so it’s hard for another person to step in. I know some people get frustrated when they’re asked to follow some of our procedures -- and I know there are things that could be streamlined, but I don’t have time to rethink the way I do things.”

“So the processes are inconsistent?”

“They are. A lot of times I think we end up with multiple layers of procedures because different people do things in different ways, and I know that makes it harder to learn the systems. Different workers come in knowing different software, and they don’t want to learn something new -- or maybe



they can’t learn it in the minutes between phone calls and patients.”

Right on cue, the phone rang and Luisa stopped to answer it. Alex thought about what Luisa was describing. He realized that she did her best to shield him from the things she thought of as petty problems, so that he only saw the cases where the ongoing issues affected the practice. But he could now connect some things he had noticed before with the situation Luisa was describing.

“I think for some of the staff, it comes down to trying to please you or me or an insurance company or another clinician,” he observed when Luisa hung up the phone. “They’ll do what they think they need to do to keep us happy.”

“It’s true,” Luisa agreed. “Then problems are under the surface till they break out.”

And all these things get in the way of my spending time with my patients, thought Alex. He was closer to identifying the real source of the problem -- but a solution still seemed out of reach.

Streamlining the System

Could software be the solution for Alex and Luisa’s problems?

Luisa straightened her desk, squaring up the corners of the stack of papers she’d have to file in the morning. She heard the doctor coming down the hall, his briefcase knocking against the plant in the corner as it did most afternoons. Every day she thought she should move the plant, and the next day she didn’t think of it -- till Dr. Friedman banged against it again on his way out.

“Dr. Friedman,” she called, standing. “I appreciate your taking the time to talk with me. I feel a lot better.”

“I’m glad,” Alex Friedman smiled. “I wish we had come up with a solution, though, instead of just clarifying the problem. I guess that’s the first step.”

“If you have a minute,” Luisa continued, “I think we might be able to get closer to a solution.”

“Of course,” said Alex, setting down his battered briefcase. “This is high priority.”

Lusia nodded. “I think your briefcase and my stacks of papers say it all. We’ve been talking about switching to a good computerized system for quite a while...”

“And this might be the perfect



time,” Alex finished. He sighed. “It makes sense. We have to make major changes, we know, so why not just do it right.”

“I hear that sigh,” said Luisa, “but I think the return on investment --”

“It’s not so much the cost,” Alex interrupted. “I mean yes, of course I’m thinking about the budget as always, but I’m also thinking about the time and the complications. It seems like any time you’ve got new technology it’s hard to learn, hard to use, and hard to fit into your routine.” He laughed. “I think I’m a smart guy, but it took me and Laura a whole weekend to figure out how to use our Roku.”

Luisa smiled. “I’m concerned about that, too, especially with the amount of staff turnover we have. I’ve been thinking about it a lot, though, and I think the important thing is to choose a system that works for us.”

Alex nodded.

“I figure we need something integrated -- a turnkey system that

we can learn and use without having to bring in IT guys to configure it for us. It needs to be designed for a team to use -- not one package for accounting and one for scheduling and so on. Just one system that works for everybody.”

“That makes sense.”

“I think it also has to be possible for us to use it with different devices. You know some of the team are most comfortable with tablets, and we don’t always have a desktop computer for every person.”

“Sure. A lot of the student workers are most comfortable with their smartphones.”

Luisa agreed. “I’d also like to have training from someone who really knows how to use it. We could probably figure things out on our own, but I think it would be more efficient if we learned it completely, and maybe had support while we were learning.”

“Coaching, maybe?” Alex suggested.

“If we needed it,” Luisa agreed. “We don’t really have extra time for lots of trial and error.”

Alex hefted his briefcase. “That sounds like a very clear picture of what we need in a software package. Maybe I’d be able to do some work at home without lugging this thing around, too.”

“That plant would probably be grateful,” Luisa said. Alex looked at her quizzically, but she just shook her head. “Thanks, Dr. Friedman. I’ll start researching programs tomorrow.”





The Experts Respond

Lauren Gonzalez, MA, MFA, MFTI,

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In the article, Laura does what appears difficult for Alex; she validates him. She says to him, when he speaks of losing patients due to inconsistent paperwork and billing issues, “That makes complete sense...” She further validates him by addressing his comment on compliance: “A big deal in mental health practice,” she reflects. Laura’s clarity allows her to identify that Luisa, the office assistant, is limited in her ability to do her job managing clients because she doesn’t have access to the right tools to do so. As therapists, it’s important to think about how time plays a role in our practice, and the concept of time goes well beyond the 50-minute therapy session.

Among case notes, assessment, treatment planning, consultation, between-session scheduling and contact and billing, paperwork and office management accounts for a sizable percentage of the time therapists spend managing their caseloads. With an average caseload of 20 weekly clients, one could feasibly double the amount of time spent managing one’s practice around such client hours. It is easy to get lost in piles of ephemera accumulated over time in treatment.

An organized therapist more likely provides organized treatment.

The article makes another important point, too, that being that as therapists we can’t fight the preferred methods of

communication and information management, that being primarily smart phones. Resisting the fact that many people today use smart phone technology to book and manage appointments, as well as to seek services (Yelp, etc.) in the first place is futile. Alex’s frustration comes from an understandable and familiar resistance—change doesn’t come easy. But it takes more energy to fight reality than it does to adapt once we have the emotional incentive to do so. Then, we need to know the steps.

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At first glance, it seems like Alex and Luisa have fallen into the all-too-familiar position of husband and wife rather than employer and employee. This is a common occurrence when there are only two people working in an office setting, and may have even contributed to the high employee turn over.

After speaking with his wife, Alex seems to gain clarity on his role as owner/ employer. At first he is completely absorbed with his office management issues, but his wife’s excellent communication skills giving empathy to his dilemma quickly help him to de-escalate. He is then able to apologize to Luisa and own his part of the problems that they are experiencing.

Once they each have a better understanding of each other’s position and feel like they have been heard, they are able to come up with and agree on a new system that will not only work for both of them, but also ultimately attract and keep future employees.

What Would You Do?

Some advice from the community

Just imagine if each team member could actually see how much each one is contributing to the overall workload – would this eliminate the finger pointing and create some shared responsibility?

- Eldad De-medonsa

Does Alex’s staff truly understand what his mission is? Have they bought in to what he wants to accomplish? Has he provided the necessary tools to his staff to accomplish his mission? Working together as a team toward a common goal will net good results. Not having the proper tools will result in frustration.

- Charles Pritchard

Team work seems to be what is missing. You need a workflow system that will foster team work in the office. When using a system that allows everyone in the office to see what needs to be done and by whom you can end the blame game. When everyone is on the same page then the work can continue even when someone is absent.

-Heather Miller

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