

## PRACTICE PEARLS

### Stop providing secretarial services for referrals

**W**hen we refer patients for more specialized services, our offices are often expected to work with these patients to schedule their referral appointments and answer questions. We are not paid for this work; however, it does generate income for the referral specialist. Recently, our office decided to put a stop to this practice. When one of the physicians objected, I sent the following reply:

“Thank you for your note regarding referrals and your expectation that we make all arrangements for the patients. There are many reasons why we request that your office call the patient after we have made the referral. Many times the initial appointment will not work for the patient, and then we have to call your office back. Many times the patient may have questions regarding where you’re located, what insurances you accept, what they should expect at the visit, etc. It makes little sense for our office to sit between the two parties that need to communicate directly with one another. We have found that we are serving as a free secretarial service for specialists’ offices whose staff members do not wish to make the telephone calls necessary to bring them business. We refuse to do this any longer.

“I have monitored this situation, and it is taking on average five telephone calls per referral and almost one hour of staff time. We receive

## Q&A

### HIPAA business associate agreements

**Q** I recently read about a medical practice being fined \$100,000 by the U.S. Department of Health & Human Services because it violated HIPAA (the Health Insurance Portability and Accountability Act) and didn’t have a business associate agreement with the online appointment scheduling service it uses. (See <http://www.hhs.gov/news/press/2012pres/04/20120417a.html>.) When I asked the service I use whether they would be willing to sign a business associate agreement, they said HIPAA doesn’t apply to them because they do not perform insurance, payment, or related transactions and do not collect any medical history from patients. Are they correct?

**A** Based on the information provided, I would say that the company you are using for online appointment scheduling would be considered a business associate under HIPAA. If the company enables online appointment scheduling, it is most likely collecting what HIPAA refers to as personally identifiable protected health information, such as the patient’s name, address, birth date, and reason for being seen by your office. The company should be willing to sign a business associate agreement.

Renae Moch, MBA, CMPE  
American Academy of Family Physicians  
Leawood, Kan.

no reimbursement for these services. Thus, we are expending almost \$20 for every referral we make. This is often 25 percent of the fee we receive to see the patient. I am not aware of any other industry where the party providing referral customers for a business is expected to expend revenues for that business.

“As health care dollars shrink, we can no longer provide our services for specialist practices free of charge and are developing referral patterns to allow us to reduce these expendi-

tures. If this will not work for your practice, please let us know.”

Michael S. Niziol, MD  
Richford, N.Y.

### Use technology to store all your notes, tasks, and ideas

I have found Evernote (<http://www.evernote.com>), a software program designed for notetaking and archiving, to be a great tool to allow me to focus on the task at hand and mentally shelve other important but not urgent tasks. I try to make a habit of coming back to those items at several “refocus times” during the day. Evernote is accessible on my PC, tablet, or smartphone, and is also a great collaboration tool.

Tripp Bradd, MD  
Front Royal, Va.

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Practice Pearls presents the best advice on effective, efficient practice operations and patient care drawn from the medical and business literature, along with tips developed from your experience. Send us your best pearl (250 words or less), and if we publish it, you’ll earn \$25. We also welcome questions for our Q&A section. Send your pearls and your questions to us at [fpmedit@aafp.org](mailto:fpmedit@aafp.org).

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