



Story:

Opened new practice as physical therapist, excited to run a new business on his own terms. Practice starts out in debt, has moderate clientele, and being a smaller practice he only has two employees.

How he receives payment for his services are through insurance companies, and did not anticipate how difficult it would be to receive payment for services rendered from the insurers. Because of this, he is 5 months owed payments from the insurance companies.

Brent: Insurance Wrangler

"Some solo-practice physicians are being driven out of business entirely due to insurers first refusal to pay for services rendered. You become a doctor to be a doctor, not to worry about billing."

Brent's motivations

- Wants to reinvest his earnings into building the clinic
- Keep business afloat to avoid further loans, bankruptcy and to pay employees

Brent's ideal experience

- Never have to deal with insurance companies
- Receive payment from insurers a month from services rendered
- Concentrate solely on building practice and driving clientele

Brent's frustrations

- Cannot find a solution to sync billing data and patient schedule to confirm cash-flow cadence
- Needs to hire an expert who will manage the process of receiving due payment more smooth and consistent occurrence



Story:

Jane is a dental office manager in a medium sized clinic. She is responsible for managing the front desk staff, establishment of staff schedule, and handling all accounts payable functions.

Jane is a good self motivator worker but overwhelmed with duties and always busy at work. The dentist ask for her to make sure the clinic is compliant with the new government healthcare regulations to stay ahead of the protocols and avoid fees.

Jane: Compliance Wrangler

“As the medical procedures and insurance coverage becomes more complex, health care providers are looking to outsource the task of remaining compliant with the new regulations. I have no idea where to start looking.”

Jane's motivations

- Keep her job
- Keep the company from being fined
- Be knowledgeable to avoid accidental non compliancy

Jane's ideal experience

- Find and communicate information about all governmental regulations that apply to her office, and healthcare practice
- Keep her office compliant and up to date with changes

Jane's frustrations

- Limited in time, she needs to find a solution as quickly as it's possible
- She needs a description of terminology that she will easily understand



Story:

Recent graduate continuing education in masters degree desiring to run her own clinic and eager to please and is enthusiastic about her work.

Does not have time to filter through paperwork and compile all patient records that may be associated to a single patient. Seeks to reduce the amount of time spent on searching, finding, and pulling records as well as updating each piece of paperwork and refiling.

Lynn: Records Wrangler

"For every patient, the doctor needs large volumes of paperwork (records, patient scheduled, past notes) that I spend more time finding records and updating paperwork than assisting the doctor with patients."

Lynn's motivations

- To prove her skills and abilities
- Wants to learn and shadow doctors instead of spend time on paperwork

Lynn's ideal experience

- Find an easier way to execute patient records in the most efficient timely manner.
- Implement a digital solution that allows her to easily access all customer data and transcribe doctors notes.

Lynn's frustrations

- Though the process of pulling paper records for each patient is extremely time consuming, the EMR (electronic medical records) system is too difficult to navigate and understand
- Is not getting the education she needs from shadowing the doctor because she is too busy pulling, updating, and filing paperwork.