

## 6 Office Tasks That You Can Automate

Easy-to-implement tech solutions to manage routine tasks.



### BUSINESS ADVISOR

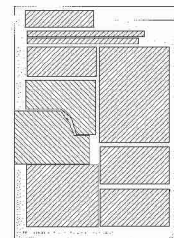
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It's often been said that we're becoming slaves to our technology, but I don't feel that way when I think of the ways you can automate office tasks to make the business of surgery a more efficient and economical enterprise. Here are a few office automation solutions that are relatively easy to implement.

**1 Archive your paper records** *WHAT TO DO* Archive many of the records that you typically file in cabinets today.

*HOW TO DO IT* Advances in scanning technology combined with inexpensive networking and storage make it easy to do this. Inexpensive scanners, such as the Fujitsu Scansnap, can scan multipage two-sided documents into standard Adobe Acrobat (PDF) files quickly and easily.

Accounts payable records are particularly ideal for scanning because of the space they consume and the relative frequency with which you'll need to access them again. You can then destroy the originals and store the PDF files on a network hard drive for access by anyone with a computer and appropriate password-access privileges. After that, you should back records up or store them on a CD. While this scanning will require employee resources, you'll probably find that the ease with which records can be accessed, combined with the use of staff downtime, makes the cost negligible. Note: You can use filing software provided by the scanner vendor or simply save the files on the network in folders and subfolders by vendor.



## **2** Set up a computer-based fax service

**WHAT TO DO** Get rid — or at least limit the use — of your clunky paper fax machine.

**HOW TO DO IT** While you can use online services such as [efax.com](http://efax.com), which lets you use a Web browser to access incoming faxes, you can easily set up a computer-based fax service by putting a fax modem and a computer in your facility, hooking up the incoming fax line to the modem and installing Microsoft Fax Services (included in Windows XP). A local computer professional can do all this in less than two hours.

When you set up the services, you can save faxes on a network drive and thus provide access to any employee with a computer on the network. You can print hard copies when necessary and save faxes in network directories for future reference. Microsoft Fax Services also provides a log of all faxes received. While you'll still need to keep the old fax machine for outgoing faxes, you'll find the use of a computer provides better document trails and leads to fewer lost faxes.

## **3** Order online

**WHAT TO DO** This may seem obvious in this day and age, but it bears repeating: E-mail is a highly effective way to order supplies for a surgical facility.

**HOW TO DO IT** Most surgical vendors have some provision for either placing orders through e-mail, or on their Web site. E-mail is an inexpensive way to keep track of orders and follow up on outstanding orders.

## **4** Post your policy and procedure manual

**WHAT TO DO** For easy access, put your policy and procedure manual on your network.

**HOW TO DO IT** Put each of your policies into separate Microsoft Word documents with file names that match the title of the policy. You can then put these policies up on your network into directories named for the type of policy (business office policies, for example). You might want to make the documents read-only so that employees can't change them

accidentally (or intentionally).

The advantage of computerized policies and procedures is that they can't be lost or mutilated. They can also be easily searched using functions within the Windows system for searching file names and the contents of files. Policies can also be accessed by any computer connected to the network, and more than one person can be reading the policy at a time.

## **5** Pay by credit card

**WHAT TO DO** Consider pulling out the corporate AmEx to pay your major vendors. While this isn't really an automated technology solution, it's still quite useful because it's conducive to time savings.

**HOW TO DO IT** You'll find that many of your major vendors will accept a credit card for payment. While you still have to match invoices, purchase orders and receiving documents, you'll save a considerable amount of time in preparing checks, copying and getting them signed. After invoices have been matched with the appropriate supporting documents, you can complete a charge slip provided by the vendor and have the authorized card user sign it. You can fax the charge slip to the vendor. In addition to the time savings, many cards, let you accumulate points that can be redeemed for travel, gift cards or shopping rewards or even cash back. You can then use these

rebates to pay for transportation and lodging for conferences, gift cards for employee recognition, holiday gifts or items for the staff lounge, or put the cash toward other bills.



### Create an electronic patient message board

**WHAT TO DO** A fast and relatively easy way to communicate information to patients in the waiting room is to set up a large-screen monitor attached to a personal computer. Many commercially available big-screen LCD monitors will hook up directly to computers nowadays.

**HOW TO DO IT.** On the

computer, you can use a program such as Microsoft PowerPoint to set up presentations that run continuously. The presentations can include the answers to commonly asked questions, such as the location of restrooms, snack machines or coffee. You can also use the presentation to provide information on billing practices, the names of doctors who work at the facility and privacy practices. **OSM**

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