

PracticeUP!

Quick Reference Guide

www.PracticeUPOnline.com

Follow Up to:

Assessments and Price Estimates for Your Work with Your Client (102)



Tools Needed:

- ◆ Interview process
 - ◆ Recording tool
 - ◆ Note taking system
 - ◆ Practice Management tool (software)
 - ◆ Your pricing/price list
 - ◆ Estimating and Invoicing process (software)
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Practice Management Applications:

These are applications you can use to manage your clients. Some include invoicing and time tracking. Some allow your clients access, too. Be sure to check to see if they are HIPAA /PIPEDA compliant, and if you can access them with all the devices you would want to use.

- ◆ MyJunna (case managers and advocates)
- ◆ Practice Fusion (physician-focused)
- ◆ Case Connect (workers comp and advocacy)
- ◆ SimplePractice
- ◆ Cosmolex (built for lawyers)
- ◆ Best Notes
- ◆ ChARM EHR
- ◆ NoMore Clipboard
- ◆ Picnic Health
- ◆ MyMedicalRecords:
- ◆ Health Vault:

Find reviews of these and other apps at www.Capterra.com

Reminders and Best Practices:

1. No free assessments!
 2. Meet in a safe place
 3. Tools must meet HIPAA or PIPEDA requirements.
 4. Do not make promises beyond your competency.
 5. Estimate more time than you think a task will take.
 6. Track your real time to help you with future estimates.
 7. Manage scope creep and your estimate.
 8. Brand everything!
 9. Surprise your client with "more" (something extra)
 10. Upon delivery: be prepared with your contract, invoice and HIPAA or PIPEDA forms
 11. Don't begin the work until you have been paid.
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