PracticeUP! Quick Reference Guide

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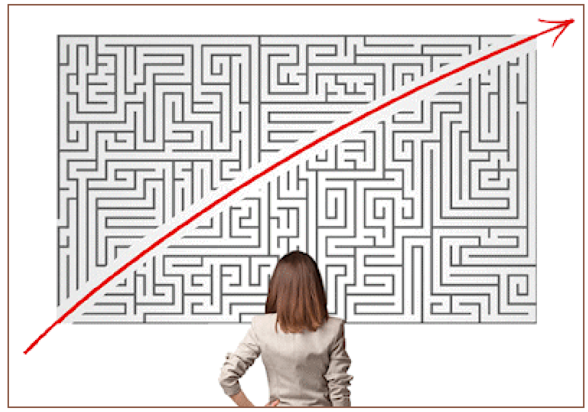
Follow Up to:

Best Practices in Advocacy and Care Management (802)



Legal & Ethics Best Practices

- No decision making or recommendations for anything that can affect their outcomes
- Use a contract
- Maintain HIPAA level privacy
- No compensation, referral fees, commissions or selling products
- Do not accept gifts

Financial Best Practices

- Do not do pro bono work.
- Do not begin your work until you have received payment.
- Keep good invoicing and payment records.
- Do not accept or request compensation for referrals. (no commissions, do not sell products)

Insurance Best Practices

- Maintain liability insurance to cover you in case of legal problems – it's about what people THINK you did or didn't do!
- Do not drive clients yourself in your own vehicle.

Documentation Best Practices

- Dates
- Tasks
- Costs / Expenses / Income
- Contacts
- Conversations
- Origins
- Next steps (forward motion!)
- Keep records for 7 to 10 years
- Storage options: be sure to cover HIPAA privacy

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Time, Travel, Expenses Best Practices

- Track your time – for information and for billing purposes
- Track your travel time and mileage
- Track all expenses. Keep all receipts.
- Track against client as needed for future use, and for invoicing purposes.

Working with Other Professionals

- Co-working contracts
- Negotiate fees
- Non-compete contract (if possible)
- Immediate payment
- Track for payment and tax purposes – theirs and yours.

Client Service

Basic Tenets:

- Allegiance
- Friendliness
- Empathy
- Fairness
- Help them feel in control
- Provide supportive information
- Timely delivery

Best Practices—Part I

- Listen Listen Listen! (“Active Listening”)
- Ask about contact with others (family)
- Manage expectations:
    - Always answer ‘what’s next?’
    - Maintain limits – don’t be afraid to say “no”
    - Maintain authenticity – don’t be afraid to say “I don’t know”
- Provide HUSTLE! (Don’t accept “no” from professionals. Use creative problem solving.)
- Document everything

Best Practices—Part II

- Let them feel like they are in control (do this by educating them – but not insulting their intelligence)
- Take the time to explain
- Be clear! (“anti-medspeak!”)
- Keep an “always” service list, such as advance directives, med reviews, others
- Invite constant feedback. Thank them for each instance. Then take action.

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Client Service

Best Practices—Part III

- Make it easy for clients to do business with you – remember, FUDGE makes it harder for them.
    - E-signatures?
    - E-invoices?
    - Encrypted email
- Invoice early, and be clear on payment expectations
- Anticipate what can go wrong (safety and promises)

Best Practices—Part IV

- Never drive a client yourself.
- Under-promise and over-deliver (and keep your promises)
- Always reply quickly (phone, email, text)
- Stay in constant contact, even when things are quiet, or after your work is finished.
- Document everything! Including:
    - Birthdays/other important dates,
    - Partner's names
    - Family contacts when you can (contact list)
- Send thank-you notes (handwritten are best!)

Marketing Best Practices

- The less said, the more read.
- Mystery invites inquiry.
- 7 to 9 exposures to your brand and services
- Tools must be consistent with your brand and each other.
- All marketing should refer to all other marketing.
- Mind your timing! (calendar - and freshness, too)
- Manage expectations. Don't make claims you can't prove. Disclaim examples.
- Ask for feedback, then use it for your marketing or client service improvement.
- Ask for word of mouth (Create evangelists!)
- Market constantly - a little every day (grow your business, replace clients)
- Mind your SEO (search engine optimization)
- Measure measure measure.

Personal / Professional Best Practices

- Stay safe.
- Develop your own resource bank.
- Get certified.
- Keep learning.
- Avoid burnout.