



The Newsletter of  
Primary Eyecare Network

# *focal point*

September / October 2009

## ***Electronic Medical Records in your Practice***

PEN's Special 2009 Program  
with MaximEyes, OfficeMate & Opto

***See Details Inside!***

### **What's Inside**

- Essilor puts Profit back in Your Practice
- Early Seminar Registration Saves \$\$\$
- Tips for Maximizing Patient Potential
- Help Those in Need: *World Sight Day Challenge*

### Medicare Fee Collection

PEN's Optometric Billing & Consulting Department has received many questions about what part of the physician's fee a Medicare patient is financially responsible for and when that fee can be collected. The following information will help you better understand this very important topic.

### Financial Responsibility

Medicare patients are responsible for:

**1.** Their yearly deductible (\$135 for 2009), **2.** Co-insurance (20% of Medicare's allowed amount), and **3.** All non-covered services that have been rendered.

### When to Collect

You may collect the fees listed above either at the time the services are rendered or after Medicare has issued an Explanation of Benefits (EOB) indicating the dollar amount that the patient is responsible for. There are several issues to keep in mind as you decide which method is best for your practice.

If fees are collected when services are rendered, the amount should not exceed 20% of Medicare's allowed amount (if the patient's deductible has been met) plus the fees for all non-covered services. Excluding non-covered services, any amount that exceeds Medicare's allowed amount must not be charged or "balance billed" to the patient and should be written off.

Also, all fees that have been collected from the patient must be indicated on the claim form that is submitted to Medicare for payment. This means that fees may not be collected between the time the claim has been submitted and when Medicare issues the EOB.

For several reasons it is common for practices to collect amounts owed after the claim has been processed:

- Medicare applies the deductible to a claim based on when it was received and not the date of service.
- The co-insurance that has been estimated by the practice may not be the same as it appears on the EOB once the claim has been processed.
- The patient's secondary insurance may reimburse the provider for deductibles and co-insurances.

These situations, however, can cause accounting issues for the practice and patient frustration as a result of being under or overcharged. If you find that it is increasingly difficult to collect from the patient after services have been rendered, you may want to consider collecting from your patient at the time of service.

To view the complete Medicare Claims Processing Manual visit <http://sn.im/cmsclaimsprocessingmanual>.

## Red Flags Rule:



### Requirements for Health Care Providers

Medical identity theft occurs when a person seeks health care using someone else's name or insurance information. Victims may find their benefits have been used or encounter inaccuracies in their medical records. There may also be a high cost for health care providers due to unpaid bills.

The Red Flags Rule, enforced by the Federal Trade Commission as of November 1, 2009, requires many health care providers to develop a written plan (Identity Theft Prevention Program) to help detect, prevent, and minimize the damage that could result from identity theft.

To find out if you are a health care provider who must comply with the Rule and learn what is required if you are, email [PEN@primaryeye.net](mailto:PEN@primaryeye.net) for a complete version of this article. Be sure to mention the "Red Flags Rule" in your request.

## World Sight Day Challenge

The *World Sight Day Challenge* is a fundraising initiative of Optometry Giving Sight, the philanthropic arm of PEN, supporting vision care, local training, and infrastructure development in countries with little or no access to quality eyecare services.

As an optometric practice, how can you participate in the *World Sight Day Challenge*?

- Donate your eye exam fees to Optometry Giving Sight on any day in October. Contact PEN\* for details on how to donate.
- Become a regular donor by contacting the PEN office\* and asking to have a monthly, yearly, or one-time donation billed to your PEN statement.
- Plan a practice celebration that gets patients and staff involved. Contact PEN\* to request your free kit of materials. It contains everything you need to create a great practice and community event including a press release promoting your involvement, which Optometry Giving Sight can help you place in your local newspaper.



This year Optometry Giving Sight is highlighting the need of the millions of mothers, wives, and daughters who do not have access to the most basic eye care services. Together we can help millions in need!

**\*Contact PEN at [PEN@PrimaryEye.net](mailto:PEN@PrimaryEye.net) or 800-444-9230.**



Attend PEN's Special 2009 Program  
**Going Paperless with EMR,**  
 Electronic Medical Records in your Practice

*How do I adapt to this new technology?*

*What does this mean for me and my staff?*

***Where do I even begin?***

**PEN HAS ANSWERS FOR YOU AND YOUR STAFF!**

Don't miss this rare opportunity to meet with industry experts:



**MaximEyes® by First Insight®**  
 Paperless Practice Management and  
 Electronic Medical Records Software



...for a unique Q&A session with live demos & exclusive show specials.

**Saturday, October 17, 2009 - 9:00am-4:00pm**  
 Sacramento, Hilton-Arden West

Register your team today!\* Call 800-444-9230.

	<b>Early Bird Special</b> Register by 9/15/09	Regular Price
<b>PEN Member</b>	<b>\$125</b>	<b>\$165</b>
<b>Non-Member</b>	<b>\$175</b>	<b>\$215</b>
<b>Save 20% when you register 2 or more attendees!</b>		

\*Federal funding incentives may be available if you take action soon.

**Call 800-444-9230 or fax completed form to 925-838-9338**

Attendees: 1. \_\_\_\_\_ 3. \_\_\_\_\_

2. \_\_\_\_\_ 4. \_\_\_\_\_

Practice: \_\_\_\_\_ Contact: \_\_\_\_\_

PEN ID#: \_\_\_\_\_ Phone: \_\_\_\_\_ **Email:** \_\_\_\_\_

Non-Member Billing  Visa  Mastercard Name on credit card: \_\_\_\_\_

Credit Card #: \_\_\_\_\_ Exp Date: \_\_\_\_\_

Billing street address: \_\_\_\_\_ Zip: \_\_\_\_\_



# Don't Miss PEN's Doctor Seminar Becoming a Medically Based Practice

Presented by Aaron Lech, O.D.



## Generate an increased & consistent revenue stream.

Learn about paneling with insurance carriers (credentialing & contracting), creating billing systems, case history, chart documentation, and proper medical decision making.

## Register Today!



**Rancho Cordova, CA**  
Saturday, September 12, 2009  
Marriott Sacramento-Rancho Cordova  
11211 Pointe East Drive  
Rancho Cordova, CA 95742

**Irvine, CA**  
Thursday, November 12, 2009  
Hilton-Orange County Airport  
18800 MacArthur Blvd  
Irvine, CA 92612



**7:30am - 8:00am Registration • 8:00am - 12:00pm Lecture**

<b>Early Bird Pricing</b> <b>Before September 7, 2009</b> <b>\$95</b>	<b>PEN Members</b> <b>After September 7, 2009</b> <b>\$145</b>	<b>Non-Members</b> <b>After September 7, 2009</b> <b>\$165</b>
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### (List All Attendees for This Event)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

### Practice Registration Information (All Fields Required)

Practice: \_\_\_\_\_

Phone: \_\_\_\_\_ **Email:** \_\_\_\_\_

Contact: \_\_\_\_\_

Bill my PEN account #: \_\_\_\_\_

Bill my credit card  Visa  Mastercard  Account #: \_\_\_\_\_ Exp Date: \_\_\_\_\_

Name on credit card: \_\_\_\_\_

Billing street address: \_\_\_\_\_ Zip: \_\_\_\_\_

**Primary Eyecare Network • 800-444-9230 • www.PrimaryEye.net**

Please fax completed form to PEN at 925-838-9338



# PEN Education

Dedicated to Professional Optometry

September / October 2009

## Educational Opportunities

### Becoming a Medically Based Practice

presented by Aaron Lech, O.D.

Learn how to generate an increased, consistent, and recession resistant revenue stream, while also improving patient care and retention.

**Sacramento/Rancho Cordova Marriott**      **Irvine, Hilton-Orange County Airport**  
Saturday, September 12, 2009      Thursday, November 12, 2009

\*See enclosed registration form...early bird price ends September 7th.

### Going Paperless with EMR; Electronic Medical Records In Your Practice

Meet with industry experts from MaximEyes, Office Mate and Opto for a unique Q & A opportunity featuring live demonstrations.

**Sacramento, Hilton Arden West**  
Saturday, October 17, 2009

\*See enclosed registration form

### CRT: Integration & Certification

presented by Richard Baker, O.D., F.A.A.O.

Learn the facts of integrating Corneal Refractive Therapy (CRT) in your practice from a successful practitioner: the certification process, practical tips on getting started, case studies, plus Q & A on the economics of CRT. Note: CRT Certification Exam included

**Walnut Creek, Embassy Suites Hotel**  
Tuesday, October 27, 2009

\*Special Evening Seminar

### Medicare Billing & Coding 2010

presented by John A. McGreal, O.D.

Increase your practice revenue by learning about correct levels of billing that can instantly improve your practice's profitability.

**Glendale Hilton**  
Saturday, January 16, 2010

**Sacramento, Hilton Arden West**  
Saturday, January 30, 2010

**Irvine, Hilton-Orange County Airport**  
Sunday, January 17, 2010

**Pleasanton Marriott**  
Sunday, January 31, 2010

Call 800-444-9230 today for more information or to register.

## Education Schedule

Your copy of the PEN Education Schedule for September-December 2009 should be arriving soon. For additional copies, please call PEN at 800-444-9230. You may also view the current education schedule online at [www.PrimaryEye.net](http://www.PrimaryEye.net).

## Upcoming Classes

### Staff Education

Resister for am, pm or both.

#### SEPTEMBER

**Frame Adjusting** (am class)

**Frame Styling** (pm class)

*Reno* - Wednesday - September 2nd

**Frame Adjusting** (am class)

**All About Lenses - Level 1** (pm class)

*San Jose* - Thursday - September 10th

#### OCTOBER

**Maximizing Optical Sales** (am class)

**Inventory Control** (pm class)

*Pasadena* - Thursday - October 8th

**Center for Paraoptometric Education**

(3-Day) Monday - Wednesday

*Pleasanton* - October 19th-21st

### Doctor Seminars

#### OCTOBER

**Going Paperless with EMR;  
Electronic Medical Records In Your Practice**

*Sacramento* - Saturday - October 17th

**CRT: Integration & Certification**

Presented by Richard Baker, O.D.

*Walnut Creek* - Tuesday - October 27th

#### SEPTEMBER & NOVEMBER

**Becoming a Medically Based Practice**

Presented by Aaron Lech, O.D.

*Sacramento* - Saturday - September 12th

*Irvine* - Thursday - November 12th

#### Staff Education Sponsors:

ABB CONCISE, Addison Bay Insurance,  
CIBA VISION, ELOA, Hoya Vision Care,  
Marchon Eyewear, Safilo USA

For future dates, additional  
course offerings or to register,  
call PEN at 800-444-9230.

# Maximizing Patient Potential

by Mary E. Schmidt



**Mary E. Schmidt**  
PEN Instructor,  
President of Eye  
Systems Consulting

How full is your appointment book? Is your staff taking the extra time with each patient to make them feel valued by the practice? Have you altered your schedule to accommodate patients who don't want to take time off work for an eye exam? Are your patients purchasing at the same level they did two years ago?

Now is not the time to "do it the way we've always done it." This is the perfect time to re-evaluate what you're doing and why.

**Is your appointment schedule completely full?** If not, seize the opportunity to spend a few extra minutes with each patient, making them feel special and very well cared for. Chances are patients will return to family, friends and co-workers raving about the experience in your office and the high quality of care. Patient referrals are the most effective method of growth in tough economic situations.

**What are your hours of operation?** Are you adapting to your patients' needs or sticking to your old ideas? In today's economy patients may not feel comfortable taking time off work for health care. Do you have enough Saturday hours to accommodate them, or are they going elsewhere? Doctors might consider taking a day off during the week and seeing more patients on Saturday. Another option is to schedule the first appointment of the day at 7:00 AM, allowing patients to have their exam before they head to work.

**What product options do you offer your patients?** Does your current product mix have enough middle to high end products? Now is not the time to offer lower quality product. Especially in this economy, people need to buy the best they can possibly afford. Buying a poor quality frame, which may break or won't maintain its adjustment, is not a good deal. It may also have a long-term negative effect on your practice, as patients may not remember they saved money, but they will remember the frame didn't last. If you don't have confidence in the product, don't offer it to your patient. Check with your current vendors. They may be able to help you find a high quality, closeout frame at a low price.

**Is everyone in the practice pulling together and moving the same direction?** Good communication and a well-trained staff are more important than ever. This is

the time to establish an ongoing internal training program, brainstorm solutions, and get everyone involved. The goal is to create enthusiasm and excitement in the staff.

- Doctors, technicians, and opticians should work closely together in order to implement the best methods of delivering a cohesive message to patients...i.e., the importance of quality products in meeting the patient's needs.
- Successful, experienced personnel can demonstrate techniques to other staff members or use role-playing in order to model a behavior.
- Schedule a once a week, half hour meeting to have frame vendors or lens reps come in and provide product specific training.
- Attend outside training programs. Even those who are knowledgeable on a topic can learn new methods and techniques. Then appoint a person or team of people to ensure that the newly learned behaviors actually are implemented.

Now is the time to be open to new ideas, become adaptable, focus on what's going well, and create enthusiasm. Don't spend time focusing on the negative; instead celebrate every success!



**PIO 2010**  
Preserving Independent Optometry

**Don't Miss this Important Program!**

March 26-28, 2010  
Portola Hotel & Spa  
Monterey, CA

Call Today to Reserve Your Seat  
**800-444-9230**

# Vendor Highlights

## Essilor's Support for PEN Members



Essilor Laboratories of America has been a long-time partner with PEN in support of independent optometry. Over the years, Essilor has offered exclusive PEN Member promos and has been a major sponsor of PEN Education programs, both financially and through co-sponsorship of events such as PIO 2009.

PEN Members are among the most successful practices in the nation. That level of expertise allows our members to take advantage of opportunities to become even more successful. Therefore, Essilor and PEN have teamed together once again to offer PEN Members a program that can significantly increase your profitability.

### Exclusive Program puts More Profit in Your Practice

**The Premium Accounts Program** from Essilor is your opportunity to maximize your practice profitability through your PEN Membership!

Attain a \$4,000 or more per month average in lab services and receive a 4% quarterly rebate from Essilor Laboratories of America. (Rebates are paid on total discountable Rx sales, after discounts have been applied, and not on net packages or stock sales.)

Join other successful PEN Members who are already receiving their 4% quarterly rebates. Contact your Essilor rep today to find out about your current monthly purchases and ways you can build volume in order to qualify for your quarterly rebates from Essilor.

### Educational Opportunities from Essilor

**The Essilor Knowledge Bank** is a comprehensive "bank" of online courses for opticians featuring six (6) ABO-certified courses (one hour of CE per course), with one released every two months for the duration of one year. Simply access this website, [www.totallyoptical.com/knowledgebank](http://www.totallyoptical.com/knowledgebank), and complete a short online registration to get started. There is no charge to participants.

## Luxottica Presents an Innovative Program



The first **"Working Together Series: Share, Inspire and Lead"** will be launched this month by Luxottica Group. Designed to foster meaningful dialogue and support the growth of private practitioners, this series of ten dedicated customer events will be touring the country over the next several months.

**Open first to PEN Members** (at no cost), eyecare professionals and their staff members will participate in valuable seminars and panel discussions conducted by Luxottica's senior executives. Topics will include advancing quality eye care and eyewear, the benefits of a medically based practice, the revenue potential of vision plans such as Eye Med, and optimizing patient visits through proven dispensing techniques. In addition, attendees of this series will be the first group to have an exclusive preview of Luxottica's 2010 Spring Collection with special offers for participants.

The *Working Together Series* reinforces Luxottica's commitment to supporting independent practitioners and investing in the growth of quality eye care and eyewear for everyone.

2009 Working Together Series Schedule:

<b>San Diego</b> .....	9/9/09	<b>Palo Alto</b> .....	9/15/09	<b>Houston</b> .....	10/13/09
<b>Newport Beach</b> .....	9/10/09	<b>Sacramento</b> .....	9/16/09	<b>Chicago</b> .....	10/15/09
<b>Los Angeles</b> .....	9/14/09	<b>Portland</b> .....	9/17/09		

For times, hotel information or to register, please contact Ken Laibow, Regional Sales Manager, Luxottica Group, at [KLaibow@us.luxottica.com](mailto:KLaibow@us.luxottica.com) or 805-202-9211.

## New PEN Vendor!



PEN's newest approved vendor, **Ocular Laboratories**, is also the largest independent laboratory in northwestern California. They offer extremely competitive prices, a flexible policy that meets any practice's needs, plus three decades of experience.

Ocular's excellent track record includes consistent, "next day" turn-around times and less than 1% lab redo's. In addition, their cutting-edge machinery and technical expertise allow Ocular to live up to their claim, "There is no premium lens we can't do!" Coming soon: highly sophisticated, new generation of machinery by Schneider to produce *Free Form Zeiss Individual: Auto-graph*.

**PEN Members receive a 2-20% discount from Ocular Laboratories on a sliding scale.**

Ocular Laboratories declares, "Who says you can't have it all!" • Give them a call today at 800-773-9910 and put them to the test.

## Now it's the time to reorder!

Order 500 Medical History Questionnaires, 500 Examination Forms or 500 CMS 1500 Forms by September 30, 2009, and receive 25% off from any of the following PEN Guidebooks or Manuals:

*Marketing to Grow Your Practice, Comprehensive Recall, Collections, A Better Letter, Medicare Billing A-Z, HIPAA Compliance Manual, HR for ODs, Contact Lenses: Patient Instruction, Frame Adjusting, Mastering Multifocals, The Eye Guide, or Telephone Skills That Build Business.*

**To order, call 800-444-9230, option #3.**



### ***PEN Members, win a free seat to a PEN Staff Education class!***

Transfer any two vendors to your PEN account by September 30, 2009 and purchase with those vendors within 30 days to be entered to win a free seat to any PEN Staff Education class.

To obtain an Account Transfer Form, call PEN at 800-444-9230, option #1 or visit PEN's website at [www.PrimaryEye.net](http://www.PrimaryEye.net) and select "Existing Members" from the menu bar.

### **Expanding Practice – OD Needed**

Seeking Optometrist for busy practice in Bakersfield, CA, leading to eventual purchase.

Please contact John Lindquist, OD at 661-399-1832 (evenings) or email [jlindquist@bak.rr.com](mailto:jlindquist@bak.rr.com) for more information.



**Primary Eyecare Network**  
3000 Executive Parkway Suite 310  
San Ramon, CA 94583-4255  
800-444-9230 • [www.PrimaryEye.net](http://www.PrimaryEye.net).

*Providing practice enhancement services and products to Doctors of Optometry since 1984.*