# Are you claiming all your practice income?

**Keith Taylor** has some useful tips on gathering in the money

Over the past year there has been much commentary about how the demise of PCTs has affected practice income, with specialist accountants estimating that 10% of income has been affected by the ensuing chaos.

GPs are now paid by NHS England (formerly the PCTs), clinical commissioning groups and local authorities. This means that every practice has to ensure the relevant body is invoiced for services provided and the correct level of income is actually received in a timely manner. The up-shot being that internal systems need to be designed, staff trained on their use and the systems then implemented, all of which uses up valuable management time.

The latest twist is that NHS England is apparently planning to look for efficiencies - cost savings - in Family Health Services (FHS), the support services that process payments to practices. Therefore practices must establish fail-safe systems for recording work performed and collecting income from whoever commissions the work.

With the task of credit control becoming increasingly important for medical practices, how do practices set up and establish these fail-safe systems? Here are my top tips.

## Create a monitoring system that works for you

This could be as simple as an excel spreadsheet to record:

- Type of income
- Period covered
- Amount claimed
- Date claim submitted
- Date income received

This is a simple approach but an effective one which we know is adopted by many practice managers. If used properly any gaps will become obvious which can then be dealt with manually depending on your preference.

Practices could also take the time to record the services they are providing and how much they should be getting paid per quarter or per patient. A spreadsheet could be used for tracking purposes in order to reconcile what service has been performed, how much the practice should be getting for it, and how much is actually received. This record could also be maintained manually if preferred.

## Review paperwork and keep records

Initially, all paperwork needs to be reviewed and key information established:

- What tasks have to be done by a certain date?
- Who will do it?
- When will the practice be paid and by whom?

File the following records, either paper-based or electronic to suit your way of working:

- Copies of all invoices sent to insurance companies, solicitors and individual patients.
- A record, either electronic or manual, of the date of medical, invoice name, amount, and date period.
- A separate record of medico-legal work as this is notoriously paid late.

## Highlight key dates and deadlines

Noting the key dates on a calendar will help to plan resources and ensure that there is sufficient staff and time to achieve the deadlines.

## Prioritise

Visually reviewing key dates and deadlines will

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enable you to discover possible 'bottle-necks' when too much has to be done at one particular time. You then have the opportunity to review and adjust internal deadlines to avoid last minute rushed submissions. This can be a manual process or could be computerised so you receive alerts and notifications to help you keep on track.

## Delegate and train

If there are sufficient employees, segregating these duties and giving certain individuals ownership over key tasks could prevent tasks from being missed. However, an element of training may be required and you will need the right staff for the right roles. Once an invoice has been raised, or data submitted directly, you need to ensure that the income is received. This could be as simple as keeping a file of unpaid invoices or submission documents and ensuring that they are paid, periodically chasing up any income not received. A review of claiming procedures could also be useful, especially with regard to FP10s completed by nursing staff where items can go unclaimed.

## Contingency plans

Some work will require invoices to be raised at the onset, but others at more timely intervals or when the work is completed. These dates are also key, but could be monitored by someone entirely different to those managing the work deadlines. Just be aware of the implications regarding staff sickness and holidays. What can you put in place to ensure tasks aren't overlooked or missed if someone is absent from work?

## Time

Attention to detail is vital so time must be allocated to ensuring you can complete the work required. Great care should be taken to check that the income agrees to what is expected as mistakes can and do happen!  Technology can help and potentially reduce the manual hours required and mistakes to a certain extent. There is, however, no substitute for meticulous monitoring.