

Practice Success



*Spring/Summer
2012 Newsletter*



GRAY • PILGRIM
AND ASSOCIATES, LLC

HIPAA

There are many regulations that we follow in our typical business day, but sometimes we need to be refreshed with some things.

HIPAA is one of them.

It was all the rage in 2002 when it was brought to the forefront of the news. Everyone hurried to become compliant. As time moves on, you tend to get comfortable and complacent, thereby neglecting to follow some of the rules. Take a few minutes to first locate your HIPAA materials, and then have someone in your practice review the HIPAA policies. Check to see that the compliance officer is still valid; check to see if you have all the business associate agreements signed; check if patients have signed the HIPAA forms; verify that any HIPAA violations were noted and handled correctly. How did you rate? Take time to review what HIPAA means with the entire office and review some common and easy mistakes that occur. Review the procedures.

It is a small housekeeping issue that you want to address periodically to keep your practice functioning within the guidelines. Should you have questions, we are here to assist you as best as we can.

A Letter From the Partners

Years ago spring cleaning of your house was a common thing to do. Originally it was done after the heating season had ended. Why? Many homes used coal as their fuel source; it was not a clean fuel and the houses had lots of dust and sediment, so the house had to be cleaned from top to bottom to return it to a clean state. Top to bottom meant that walls were scrubbed down, carpets were cleaned, and curtains were taken down to clean in addition to the regular cleaning. De-cluttering wasn't the big problem then like it is now either. We have TV shows now that deal with getting peoples "stuff" under control where they have to create piles to discard, donate, or keep.

Well, I like to think that we need to use this in our business lives periodically. We tend to accumulate professional reading materials, continuing education materials as well as notes and lists about things we want to take action on, but never do. We tend to get lax on items that we already have in place but never check on again to see if they still work or if they need to be updated.

Let's do spring cleaning in our offices. Look at HIPAA policies (see article); look at your archived records (see article); look at your employee handbook for current relevancy; organize your reading materials, recreate your "to-do" list with realistic due dates to hold yourself accountable; plan out projects for the year; look at your physical facilities to see if they need sprucing up. This exercise will get you moving in the right direction towards gaining control of your environment while giving you a fresh perspective to continue working on your practice. The fresh environment will invigorate you. Happy cleaning!

-Bob & Darla

GRAY • PILGRIM
AND ASSOCIATES, LLC

422 Epic Drive
Chambersburg, PA 17201
717-263-8713 (Phone)
717-263-9435 (Fax)
www.gpallc.net

Here at Gray Pilgrim we like to make life simple. That's why we offer different options to pay your bill. We accept major credit cards, ACH, and of course, cash or check.

Introducing Patrick Munson!

We have all enjoyed getting to know Patrick over the last year and a half. He tends to be very quiet so whenever he speaks, we are all sure to listen! Patrick began working for GPA in December of 2010.

Patrick was born and raised in Chambersburg, PA, attending Chambersburg Area High School, and graduated from LaSalle University in Philadelphia with a Bachelors degree in Finance. He grew up as a middle child with his older brother Jonathan and younger sister Laura.

He resides with Debbie, and their two sons, Conner, who is five years old, and Owen, who is two years old. Their most recent addition to the family is an adorable golden retriever puppy named Kane.

When Patrick is not busy with his two boys he tries to golf as much as possible in his spare time. He is a big fan of the Miami Dolphins and the Duke Blue Devils Basketball team. He also enjoys cooking and experimenting with new recipes.

We appreciate Patrick and all that he has to offer to our team!

Record Retention

We get many questions on record retention. How long do you keep old files, what do you need to keep and what is okay to destroy? We have included some information that will hopefully help clear up some of these questions. Please contact us if you have any further questions on this issue. We will also have this information posted on our website!

1 Year Retention Period

Bank Reconciliations
Correspondence with customers and vendors
Duplicate deposit slips

3 Year Retention Period

Employee personnel records (after termination)
Employment applications
Insurance policies (expired)
Internal reports (miscellaneous)
Petty cash vouchers

7 Year Retention Period

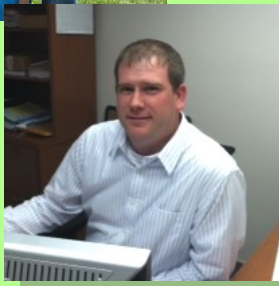
Accounts payable ledgers and schedules
Accounts receivables ledgers and schedules
Checks (canceled)
Contracts, mortgages, notes and leases (expired)
Expense analyses/expense distribution schedules
Invoices to customers and from vendors
Financial statements
General/private ledgers, year-end trial balance
Tax returns and worksheets, revenue reports, documents relating to determination of tax liability

10 Year Retention Period

Payroll records and summaries, including payments to pensioners

Permanent Retention

Correspondence (legal and important matters only)
Depreciation schedules
Insurance records, current accident reports, claims, policies, etc.
Minute books of directors, stockholders, bylaws and charter



Do you want to win an iPad?

We are trying to cut costs in an effort to minimize increasing fees. One popular way is to pay your bill through ACH rather than using your credit card. Getting miles and other benefits are nice but as you know credit card fees are costly. To encourage you to consider this method of payment we are going to have a lottery drawing from all clients that set this method of payment up with us. To do this you will need to call our office and let us know that you are interested in making your payments by ACH. We will mail you a form that you will need to complete and send back to us by July 13th with the necessary information. You will then be entered to win the iPad!