Who Does Your Charting? Virtual Assistants for Busy Practices Transcript

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Podcast Introduction and Guest Welcome

Who likes doing notes at the end of the day? Oh, yeah. No one. And if you're not getting paid on your claims, oh, it's really stressful because you were like, hey, I'm delivering the service, but I am not going to pay.

They're like hey I need to be putting out social media content. But guess what, i'm not a rockstar at that. Yeah. I mean it was a game changer because getting the systems in order is critical and usually the doctors and myself included get in the way.

If someone goes on Google and they look up a doctor in their area and their going to go on to social media, they're going choose the one that has a presence, that have videos, thats informative, and has that presence over someone that doesn't.

And that way we want to enjoy medicine again and why you got into it in the first place. So that you don't have burnouts and you enjoy what you do. What if aging isn't about slowing down, but leveling up?

I'm Dr. Isaac Jones. This is the Longevity Leaders podcast. Hi, I am Dr Ashley Beckman here on the longevity leaders podcast, and I have Travis with Cool Blue VA.

Cool Blue VA Services Overview

Yeah, hi, Dr, Ashley. We're so happy to be here and we're excited to learn more. Tell me a little bit about your service. I know in my practice, having a great quality trained VA is essential.

And I think that's the biggest game changer in my whole practice. So tell me a little bit about your services. Yeah, so everyone here at HTA, you know, they have the desire to grow and scale, right?

And the one asset that we all need and we have but diminishes is time. What we try to do is we make you think, well, what are the things that are higher level that you need to be doing to go and skill your practice?

What are things in your day-to-day operations that can be delegated to someone else? So that was the whole concept of a virtual assistant company. So how does the process work?

If I want to sign up with you, how is it? Yeah, I'll come together. Yeah. So we do a 15 minute demo call. After that demo, call we learn about what your needs are.

Some of the needs our customer service, having their phones answered, scheduling appointments and follow ups, doing the onboarding of patient intake and everything else.

And then from there, we have other admin tasks that our different doctors need help with. And we also have some doctors who use insurance. So we do insurance verification, verification prior authorizations, and following up on denied claims.

All these different things in the insurance world. Yeah, that's big. Oh, huge. That could be a full-time job. Yes. Right?

How the VA Process Works

And if you're not getting paid on your claims, it's really stressful because you are like, hey, I'm delivering the service, but I am not being paid. Other areas are social media.

So a lot of doctors are trying to grow and scale their practice. They're like, hey, I need to be putting out social-media content. But guess what? I'm not a rockstar at that.

And I use someone who specializes in that, and he's going to make me look good. We have individuals that do that as well. Then finally, we have other individuals who specialize in CRMs and basically being able to create funnels and workflows and automations and webinars.

All the different people here at HTA, they're trying do do to that so it's a really great fit. and other doctors, they also need help with scribing because who likes doing notes at the end of the day?

No one. No. It's the charting and the protocols and everything. As much as it can be automated and supported, it's much appreciated. Exactly. The beautiful part is our VAs, they are trained to do so.

So they're going to be taking notes, putting it directly into your EMR. At the end of the day, all the different labs that need to done, the prescriptions, full script and all those things, They're already filled out.

You just need a look it over, authorize it, and then it gets sent out at the of day. Oh, nice. So what are some of the software integrations that you already work with?

Yeah, the beautiful part is we work in GHL and we also use the EMR that your practice uses. We train all of our virtual assistants on eClinicalWorks, but they're happy to use your EMr, like practice better and everything else.

Okay, good. And what type of practitioners do you usually work with? Yeah, so primary care, you know, anyone in the functional medicine and wellness space.

Scribing, EMR Support, and Practice Fit

We also serve chiropractors, PTs, dentists. So all these different individuals that have the same pain points, getting their phones answered, growing their practice, insurance, and all of these areas, they all have these same points so we're happy to serve.

If you're a medical doctor, nurse practitioner, chiropractor, or other health expert that's stuck in a broken system, there's a better way. The Freedom Webinar shows you a proven five-step system to build a seven-figure virtual health practice or how to modernize your current brick and mortar practice without the burnout.

Learn to create high ticket programs, automated income, residual revenue, and attract clients ready to work with you. Book your million dollar strategy session today by clicking the link in the description.

What motivated this company's come about? Oh, that's a great question. You know, it's funny, we have a bright idea. We're located in Tustin, California, and we opened a functional medicine clinic during the peak of the pandemic.

So in California you know that the regulations are very strict. Nobody could be even in office. Right. so we're like, We have all these patients, but we don't have anyone to help serve.

Yeah, so We found virtual assistants were that solution that we were looking for. So fast forward today, you know, the first year was a little rough. You know we were just trying to break even.

But, thankfully with a lot of luck and hard work, we're hitting about 10 million in revenue each year and that's due to our virtual assistance.

Company Origin and Growth Story

So about 80% of our staff are virtual and then 20% are in person. They're greeting everyone, having the relationships, collecting payment and everything.

We're like, hey, this is such a great model. we needed to help other healthcare providers. Yeah. So you have a combination. It's not all virtual. Exactly.

Yeah, we feel like that's a great hybrid model that works really well. For sure. A lot of the times, too, when people are going virtual, it's whole different set of how to run the practice and even the software and things like.

That exactly. You got it. What? So how long have you been? How long of you had the company? Yeah, so it's been around for three and a half years and now we're continuously growing.

We have over 250 virtual assistants all around the country serving individuals and our providers are so happy. Some of them here, Dr. Jeffrey Brown, we started with him last year.

He needed a website, and we built him a beautiful website. And then we brought him social media virtual assistant to help him grow his channels and everything.

We loved it and everything. So he was so kind to create a testimonial for us. Dr. Trinh Tran, she was here, same type of story. She needed someone to help her with charting and she found a smart individual to helped her.

It's like, this solidified my operations. And she's so happy to share the good news with all the other individuals here at HCA. So you guys do social media as well as marketing?

Yeah, exactly. Okay. Yeah. Big solutions that need to be helped on. Exactly. Because our health care providers, you have gone to so much training of knowing the clinical backgrounds, knowing all the different pathways, Sometimes there's not a lot of experience in the marketing or the social media.

So we're like, hey, we can take that off your load. And so you know what? We want you to focus on the higher things and higher value areas. That way we want to enjoy medicine again and why you got into it in first place.

Pricing, Transparency, and Hybrid Support Model

Yep, exactly. You don't have burnouts and you enjoy what you do. Yes. Yeah. What's the pricing structure? Yeah, so it's really simple. It's either two things.

So it is either part-time, which is 20 hours per week, and that's at $12 an hour, or it full- time, that is $9.95 per hour and is at 32 or more hours.

No onboarding fees, no sign-off fees. no gotchas. We're all about transparency. You set the amount of hours they worked each week and you're getting billed for that.

Okay, that sounds amazing. Yeah. And that also, so is it a comprehensive package, like social media is included, all of that's included? Yeah, it's that same pricing.

So your virtual assistant, we have different categories or specialties, but the beauty is, is all the same price. They can be a scribe, they can an insurance, answering your phone's customer service.

or they can be a social media VA. So it's all the same basic fee. It's really advantageous to our doctors because we are founded by doctors and we want to make it advantage to you as well.

Yeah, that's amazing. Again, it is very transformative to have people that can help support you in all of the tasks because overall, I feel like admin, charting, we're the only ones that create the protocols, but all that takes up so much time.

How have you seen it benefit you and your practice with your VAs? Yeah, I mean, it was a game changer because… Getting the systems in order is critical and usually the doctors and myself included get in the way because I customize so much and I was changing different supplement companies and lab companies.

There's new products and services all the time. So we slow down the process I know quite a bit.

Systems, Scalability, and Practice Benefits

But again, having someone that can really help piece that all together and make it cohesive for the clients and the customer pathway is really important.

Exactly. And that's the beauty of a virtual system where we help you be scalable. So you have your ideas of what's latest and greatest, and then we systematize it, create SOPs, then it just flies on its own.

Amazing. Yeah. Well, how can practitioners get in touch with you? Yeah, so they can go to our website at CoolBlueVA.com and we're happy to serve on our web site.

We have our phone number. They can give us a call and schedule a 15 minute demo. And by doing that, we'll be able to find out what your pain points are, find what you need is.

Then we bring a smart candidate to you and then you're able interview them and get started with us. Awesome. That sounds perfect and definitely something that most people could use some help with.

Absolutely. And just one last special thing. Sure. We actually have a free two week trial for all of our listeners here. Great. So if they go to our website and mention this podcast, we're happy to mention that Dr.

Talks was able to give you a two-week free trial. Okay. And then I think the other thing that would be interesting, which I'm guessing is what you can do is if someone just wanted social media or email marketing, they could do that too.

Absolutely. 100%. So, you know, we're agnostic. We want to solve issues. You know we are here with a heart of gratitude and service. So any type of thing we need that we can, do we definitely going to serve.

Okay, perfect. Yeah, because that's a big area that a lot of us put off. And it's very important for getting clients and just letting people know, you know how you work and your success stories as well.

Exactly. If someone goes on Google, and they look up a doctor in their area, And they're going to go onto social media, they are going choose the one that has a presence, that have videos, thats informative, That has that presence over someone that doesn't.

Getting Started and Free Trial Offer

So that's where we feel like, hey, we can really make a value and benefit to the doctor and really making you look shining and the best that you can be.

Awesome. Yeah, it's something very critical because there's always new social media areas to focus on, or YouTube and Google, and it is definitely overwhelming for the practitioner.

Exactly. And what we like to do is we'd like do a scan of the latest and greatest that are happening. So we train our virtual assistants on that. When they're doing COAS, you're getting the lastest and the greatest content.

It's not like you are just testing something out, It is something that has been tried, tested and true. Yeah, perfect. Well, it was such a pleasure. I'm glad to know that you have this available.

Yeah. It's definitely something I know I needed when I first started and even just integrating it later is really critical for the success of the practice.

Absolutely. A lot of individuals we talk with, they say, oh, I may be retiring in a few years. Where were you 10 years ago? And we're like, Oh, we are happy to serve you now.

Even if you're working for one more year, this is going to bring value to you. Oh for sure. Definitely. Thank you so much. Yes, Dr. Ashley, we really appreciate your time and such a pleasure to serve and solve issues and problems in the world.

Yes. Thank you. Take care. Thanks for listening to the Longevity Leaders podcast. A Lungevity Leader's community is on mission to transform a hundred million lives by 2040. If you enjoyed the show, please share this with somebody that you know, especially another doctor or physician, but also click that follow button.

Until next time, stay strong and live long.