

OPA Services Poll Resource List

Disclaimer: Resources listed herein were identified through a survey of OPA members, who were asked for recommendations in each area. OPA has not reviewed nor does it specifically endorse any listed resources.

1) If you use billing services, who do you use, what is their contact info (please provide web address if available), what is the fee structure, and would you recommend them?

- Self-management:
 - Electronic Health Records (EHR) - see below for recommendations
 - Independent billing specialist {unnamed by survey respondents}
 - In house billing {unnamed by survey respondents}
 - Receptionist {unnamed by survey respondents}
 - Personal assistant {unnamed by survey respondents}
- Specific recommendations:
 - Ardath Ervin: 541.232.5541.
 - Mindease Billing. Marsha Hansen & Lisa Reihl. <http://www.mindeasebilling.com>. 971.533.9911. billing.mindease@gmail.com
 - Mt. Hood Billing. Rosa Henritz. 503-853-5379. mthoodbilling@gmail.com
 - Sara Osheroff 503.704.2334 sara@colibibilling.com
 - Danna Phillips with Potpourri Business Services. 888-421-0051
 - Professional Practice Management. Margaret Sears.
 - Psychotherapist Billing Services, LLC (PBS) (541)343-8122. www.pbseugene.com
 - Pulse Medical Management 42 Cenoa Lane Washougal, WA 98671 - Phone: (360) 837-3140. Dennis Hileman [pulsemedicalmngt@aol.com]
 - Two Rivers Medical Billing, Katrina Greenup, tworiversmedicalbilling@gmail.com,
 - Joyce Zilai, Medical Claims Recovery. (503) 977-0226

2) If you use accountants/tax services, who do you use, what is their contact info (please provide website address if available), and would you recommend them?

- Joseph Dallas Bailey, CPA 5335 Meadows Road Suite 410 Lake Oswego, OR 97035 Phone: (503) 332-9569 Fax: (503) 549-0121 Email: dallas@jdb-cpa.com
- Roanne Bank, CPA: 541.344.0290
- William Campbell, CPA Sisters Oregon
- William Conley, CPA - https://www.orcpa.org/public/find_a_cpa?action=firm_detail&firm_id=03346
- Dewayne Dawson in Ashland. <http://www.dawsonpccpa.com/custom.php>
- Trent Doman, <http://www.domancpa.com/>,
- Gene Emge, CPA at Emge & Whyte in Eugene
- Feller & Kuhn
- Fluence, PC. Fluence.com
- Jack W. Olds & Co.
- Mueller, Osterman, Yuva, Powers LLP 541-344-1100

OPA Services Poll Resource List

- Peters & Company PC. Craig Bush or Jim Peters. 610 SW Alder Street Portland 97205. 503.241.8080. craigb@peterscopc.com
- Portland Tax Company (Jackie Gartzke)
- Rowe, Deming & Rothman, LLC. www.roweanddeming.com 503.726.3417
- Lynn Spitaleri-Handlin at Spitaleri/Handlin Bookkeeping and Tax Service. 2801 SE 122nd Ave, Portland, OR 97236. 503-761-9267. lynn@shbats.com. <http://shbats.com/>
- Kevin Sundberg
- Tax Minimizers in Gresham
- TurboTax
- Verity Accountancy Jeff Hart 6915 SW Macadam Ave, Ste 145 Portland, OR 97219 503-281-5213
- Pam Whyte in Eugene

3) What budgeting/practice finance/accounting software resources do you use? Would you recommend them to your colleagues?

- Delphi PBS
- Excel
- OfficeAlly
- OfficeTherapy by DocuTrac
- Quicken
- Quickbooks/Quickbooks Pro
- Therapist Helper

4) What electronic health records/practice management resources do you use? Would you recommend them to your colleagues?

- Carepaths, Carepaths.com
- Centricity
- Delphi
- Epic
- Kareo
- NexGen
- None
- Microsoft Word
- PC/Mac
- OfficeAlly/Practice Mate. Officeally.com
- Qualifax
- QuicDoc by DocuTrac
- Therapy Appointment. <http://therapyappointment.com/>
- TherapyNotes. therapynotes.com
- Valant

OPA Services Poll Resource List

- 5) If you use a dictating/scribe resource, what do you use and would you recommend it?
- Dragon Dictation
 - Mac OS built-in dictation
 - None
 - Private transcription service {unnamed by survey respondent}
- 6) If you run your own practice, what type of business entity is your practice?
- DBA
 - Limited Liability Company (LLC)
 - Personal Corp (PC)
 - S-corp
 - Sole proprietorship
 - Solo
 - Unincorporated
- 7) If you provide health, retirement, disability, and/or other benefits for your employees, please list any benefits consultants or other resources you utilize to help you set up and manage these benefits?
- Dave Inman with Inman Financial Services as a personal financial advisor
 - LLC pays for health and disability insurance
 - No employees
 - None
 - Pacific Benefits Consultants for Health, Vision and Dental. Located in Springfield, OR
 - Self managed retirement plan. IRA/401k/SEP-IRA
 - S-corp pays for health and disability insurance
 - Self managed
 - Sick leave and vacation time
 - The Hartford for workers compensation
- 8) Do you contract with any services for recruiting staff and managing human resource functions for your business? If so, who would you recommend?
- Express Personnel
 - None
- 9) Have you utilized practice management/business development consultants and if so, who would you recommend?
- William Gear for employment law consultation
 - Mt Hood Community College faculty members/classes
 - None
 - Peer consultation
 - Portland Community College Small Business Development Center (SBDC). www.pcc.edu/climb/small-business/
 - Professional Practice Management. Margaret Sears.
 - Web designer