Setting Up Your Allergy Practice

Step-by-Step Considerations for Success
Introduction

The purpose of Setting Up Your Allergy Practice: Step-by-Step Considerations for Success is to provide Otolaryngologists with a practical tool that assists in starting or enhancing an otolaryngic allergy practice. The information contained within was compiled from the medical literature, professional organization educational materials, and best practices of other practitioners like you. This workbook is intended to be used to help organize the decision-making process. Each section provides information for you to consider in the design of your unique allergy practice.

It is not necessary to follow this workbook from start to finish, although it is set up to guide you through a logical progression of decision-making. The Setting Up Your Allergy Practice: Step-by-Step Considerations for Success workbook can be used as checklist, allowing you to keep track of those decisions that have been made and those yet-to-be-made. Your GREER® service team will discuss the options available to you at each step of the process and will assist you with obtaining the information needed to make informed choices.

Regardless of whether you are just beginning the process of considering this practice expansion, or are already treating with immunotherapy, or at any stage in between, we believe that the contents of this workbook will be valuable to you and your staff.

—Your GREER® Service Team
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EDUCATIONAL AND TRAINING RESOURCES

There are many educational and training resources available to physicians who are considering adding allergy testing and/or immunotherapy to their practices. Proper education is the first step to making an informed decision about whether to add allergy services to your practice and how to take the next step to make it happen. Of equal importance is the understanding of the clinical principles of allergic disease, allergy testing and treatment, as well as the understanding of day-to-day operations. The list below offers some suggestions on how to get started; however, it is not an exhaustive list.

Educational Opportunities Offered by Professional Organizations and Societies

American Academy of Otolaryngic Allergists (http://www.aaoaf.org)
- AAOA Basic Course (AAOA recommends that the physician and allergy assistant attend together)
- AAOA Core Basic Course (for physicians only; also meets educational requirements for AAOA Fellow certification)
- AAOA Advanced Course (AAOA recommends that the physician and allergy assistant attend together)
- AAOA Annual Meeting instructional courses
- AAOA Home Study Course (available for physicians only)
- AAOA Fellow Certification (physicians only)

American Academy of Otolaryngology—Head and Neck Surgery (http://entnet.org or www.aaoahns.org)
- AAO-HNS Annual meeting instructional courses and scientific sessions

Pan American Allergy Society (http://www.paas.org)
- PAAS spring allergy training course and seminar
- PAAS summer allergy training course

On-line Resources

- JCAAI Practice Parameters (http://www.jcaai.org/page/Practice_Parameters/index.v3page)
- AAOA web site (http://aaoaf)

Textbooks

GREER® Resources include

**Allergy Testing**
- Allergen testing panel recommendations
  - GREER® Allergy Map™ (www.map.greerlabs.com)
  - Botanical profiles (www.science.greerlabs.com)
- Consultation to identify optimal required supplies
- Customized testing sheet development
- Skin testing technique training
- MQT training (blend of prick and intradermal testing)

**Immunotherapy Treatment**
- Consultation to identify optimal required supplies
- Serial dilution training
- Immunotherapy formulation and dosing consultation
- GREER® Pharmacy available for Rx service
It is important to understand the local market in which your practice will compete. Research into other practices in your geographic area and beyond will help you gain a better understanding of the patient base and revenue potential for your practice. Below is a list of some sources of information for your consideration.

- Ask referring primary care physicians and pediatricians to whom they normally refer suspected allergy patients
- Visit a colleague’s practice that has already incorporated allergy
- Visit the Web sites of ENT and Allergist practices
- Contact insurance carriers to obtain reimbursement rates, as well as any certification requirements that may be necessary (eg., Fellow of AAOA)
- Check with local medical societies for information on fee schedules
- Research local newspapers, radio ads, telephone books, and billboard ads for advertisements for allergy testing and treatment
- Calculate how many patients your practice has referred out for allergy testing in the past 12 months
STAFFING CONSIDERATIONS

There are many variables in determining how to staff your allergy practice and the decisions are specific to the type of practice. The allergy staff is very important to the success of the allergy practice. The allergy assistant, in particular will likely have more interaction with the allergy patient than the physician. The list below is intended to help you with making the right choices for your practice.1,2

**Credentials**

- Review state regulations to determine if there are licensure requirements for staff who will perform skin testing, mix treatment vials, and/or give injections
- If your practice is a part of a hospital system, review specific requirements

**Qualifications for an Allergy Assistant**

- Well suited for frequent patient interaction
- Inquisitive by nature and able to collect information about progress from patients on an ongoing basis
- Able to work independently, yet understand when to seek the guidance of the physician
- Committed to learning the technical skills required for allergy testing and treatment
- Comfortable with observing patients for adverse reactions and following an established protocol for treating adverse reactions
- Detail-oriented, as needed to set up testing boards, employ aseptic technique, mix treatment vials, maintain records for expiration dates and vial contents, etc.
- Interested in developing procedures that allow the practice to run efficiently and plan ahead for growth
- Hired in advance of beginning the allergy practice to allow for sufficient time to train as well as being a part of setting up the procedures and space

**Number of Allergy Staff Members**

- Consider anticipated patient load, hours of operation, and whether the practice will perform testing only or testing and treatment
- In general, starting with 1 assistant is sufficient
- The AAOA recommends cross-training at least 1 other staff member to perform essential functions to account for the absence of the primary assistant, rapid growth, and staff turnover

**Recruiting Options**

- Existing staff (personality type and fit within office is already known)
- Professional organizations and publications (eg, AAAAI Allied Health Assembly, nursing publications, allergy nurse associations)
- Staff member recruitment among acquaintances
- Employment agencies
- Employment classified advertisements
Ideally, the allergy area is separated from the general office space to allow for an efficient flow of patients who come to the office frequently and at various hours. A separate waiting area is desired. If possible, there should be two distinct spaces: one for testing and treating patients and a second area for immunotherapy preparation, allowing for a sterile, quiet environment. Below are some things to consider as you are planning your allergy space.1,2

Testing and Treatment Space Needs

- Ample counter space for testing boards, treatment vial trays, and ancillary supplies
- Space for a patient to lie down if needed
- Ability to protect patient privacy (e.g., curtains or dividers, test only one patient at a time)
- Room for a filing cabinet or bookcase to house patient education materials and forms

Immunotherapy Preparation Space Needs

- Ability to close off the room to provide a quiet, uninterrupted work space
- Counter space for vial trays and supplies
- Room for a refrigerator (≥18 cubic feet is recommended)
- Storage space for non-refrigerated supplies (e.g., diluents, sterile empty vials, syringes)
- A “Do Not Disturb” sign to hang during testing or treatment vial preparation
- Space for a filing cabinet to house patient records

Patient Waiting and Observation Area

- Space for 4 – 6 chairs, small end tables or coffee table
- Line of sight from the testing/treatment room so the allergy assistant can observe the patient for adverse reactions
Furniture Needs

Incorporating allergy into your practice does not require a tremendous amount of new furniture or appliances. The items listed below may not all be necessary for a new practice, but could be considered as the practice grows.¹²

**Patient Waiting Area**

- 4 – 6 chairs to accommodate at least 2 patients and family members
- 2 small end tables or 1 large coffee table
- Lamps if overhead lighting is not sufficient
- Reading materials
- Bulletin board for communications (eg, patient education materials, office hours, seasonal pollen counts)
- Framed pictures of allergens, if possible
- Wall clock to help patients monitor how much time has passed since their injection

**Testing/Treatment Area**

- Exam table or reclining chair in the event of a vagal reaction or anaphylaxis
- Chair for allergy assistant
- TV/DVD for educational videotapes
- Filing cabinet to house patient forms and educational materials

**Immunotherapy Preparation Area**

- Refrigerator for storage of allergenic extracts, diluents, testing, and treatment vials (Look for the largest unit your space will allow, but avoid a freezer that is self-defrosting)
- Sufficient counter space to ensure that the allergy assistant has all needed materials at hand when mixing testing boards and treatment vials
- File cabinet to store patient records away from the patient flow area
- Cabinets for storage of supplies
- Chair(s) for formulation staff
Some of the supplies needed for the practice of allergy are already used in your practice. The quantities of those supplies may need to be adjusted for the allergy department’s needs. Your GREER® Allergy Sales Consultant can help you identify the supplies you will need.

- Allergenic extracts
- Skin testing devices
- Sterile diluents
- Sterile empty vials
- Color-coded caps
- Syringes
- Vial racks
- Labels
- Skin markers
- Skin reaction guides
- Cotton balls
- Alcohol swabs
- Topical diphenhydramine and hydrocortisone cream
- Timer for timing skin test response
- Sharps container
- Crash cart with equipment and supplies necessary for treating anaphylaxis
There are several decisions about testing that should be made when starting a new allergy practice. You will need to decide on the method of testing your office will use. A discussion of the advantages and disadvantages of each type of testing method is beyond the scope of this workbook. For more information, ask your GREER® representative or refer to the training resources in Chapter 1.

The method you choose will depend on whether you will first perform a screening test for inhalant allergies before moving on to more specific testing, or if you will test all patients with an expanded panel that includes all the clinically relevant and regionally appropriate allergens in your area. You may decide that you want the option to do both. Whichever allergens are tested should be clinically relevant based on the history of symptoms, physical examination, exposures, and regional area. You will need skin test recording sheets to capture results. Your GREER Allergy Sales Consultant can assist you with tailoring the recording sheet to your testing method. The desired method for expanded, quantitative testing needs to be determined as well.

**Method Options**

- ☐ Intradermal Testing (IDT: formerly known as Serial Endpoint Titration)
- ☐ Prick-Puncture Testing
- ☐ Modified Quantitative Testing (MQT: blend of prick and intradermal testing)
- ☐ *In Vitro* Testing

**Skin Testing Device Options**

- ☐ Multiple-site prick-puncture tests (eg, Skintestor OMNI™)
- ☐ Single-site prick tests (eg, GREER® Pick™)
To prepare testing boards for intradermal skin testing diagnosis of inhalant allergens and to ensure patient safety, several decisions must be made:

**Allergen Selection**
- Select allergens which are clinically relevant and geographically appropriate\(^1\,^2\)
  (Schedule a consultation with your GREER® Allergy Sales Consultant or GREER® Medical & Scientific Affairs representative; see the GREER® Allergy Map™ at www.map.greerlabs.com)

**Diluents**
- Bulk
- Prefilled
  - 4.0 mL phenolated normal saline
  - 4.0 mL Human Serum Albumin saline
- Colors and quantity
  - Color coded vial seals
  - Snap on color coded vial caps
- Label type and quantity

**Syringes and Vial Racks**
- Mixing syringe selection (eg, GREER® Optimix® syringe)
- Intradermal syringe
- Vial rack selection and quantity (eg, GREER® Versa Vial Rack™)

**Processes**
- Schedule for remixing the testing board every 6 - 8 weeks
- Extract log for recording expiration dates and lot numbers of extracts and diluents
- Protocol for preparation of the testing board (including aseptic technique)
FORMULATING TREATMENT VIALS IN-OFFICE VS OUTSOURCING

Some practices elect to outsource prescription formulation rather than taking on the inventory, space, liability, and staffing requirements associated with in-office vial preparation. As a practice grows, it may become more cost effective to begin uncomplicated formulations in the office.

- In-office treatment vial preparation
- Outsource treatment vial preparation (eg, GREER® Pharmacy)
- Develop immunotherapy prescription format

Considerations for Outsourcing Allergy Immunotherapy Prescriptions

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TREATMENT BOARD SET-UP

It will be necessary to determine if your practice will utilize one set of allergens for both intradermal testing and preparation of the treatment vials. This decision is usually made based on patient volume. Practices often convert from one board to two once the allergy practice grows. If you elect to set up a single board system, it is important to refrigerate the board as much as possible and that it be replaced every 6 – 8 weeks.

If you elect to set up a separate treatment board, 10% glycerin-saline may be used as the diluent. With the 10% glycerin content, this separate board will remain stable longer than the single board.¹ You will need to consider the following supplies and processes.¹²

For Single Testing and Treatment Board:
- Concentrated extracts for treatment
- Bulk 50% glycerin-saline
- Prefilled 4.0 mL vial of phenolated normal saline or Human Serum Albumin saline
- Labels for dilutions
- Color-coded caps
- Mixing syringes for preparing the treatment vials (eg, GREER® Optimix® syringes)
- Vial rack for storing completed dilutions (eg, GREER® Versa Vial Rack™)
- Schedule for remixing board every 6 – 8 weeks
- Staff scheduling that allows for quiet, uninterrupted time to compound allergy treatment prescriptions
- Aseptic procedure for preparing board

For Separate Treatment Board:
- Concentrated extracts for treatment
- Prefilled 4.0 mL 10% glycerin-saline diluent vials (eg, GREER® 10% Glycero–Saline)
- Prefilled 4.0 mL vial of phenolated normal saline or Human Serum Albumin saline
- Labels for dilutions
- Color-coded caps
- Mixing syringes for preparing the treatment vials (eg, GREER® Optimix® syringes)
- Vial rack for storing completed dilutions (eg, GREER® Versa Vial Rack™)
- Schedule for remixing treatment board every 3 months
- Staff scheduling that allows for quiet, uninterrupted time to compound allergy treatment prescriptions
- Aseptic procedure for preparing treatment board
Processes should be put in place to ensure patient safety when preparing the individual patient’s treatment vial. These may include additional training in aseptic technique and provision of a sterile environment for preparation. You will need to consider the following supplies and processes:

- Immunotherapy Rx form
- Concentrated allergenic extracts for Rxs
- Testing board (either combined testing/treatment or separate 10% glycerin-saline treatment board)
- Sterile empty 5 mL vials
- Patient labels for treatment vials
- Stock diluent (HSA or phenolated normal saline)
- Stock diluent 50% glycerin if separate 10% glycerin-saline board is not used
- Mixing syringes for preparing the treatment vials (eg, GREER® Optimix® syringes)
- Vial rack to store completed patient treatment vials (eg, GREER® Versa Vial Rack™)
- Aseptic procedure for formulating patient treatment vials and labeling
- Method for recording expiration dates and lot numbers (mixing log)
- Staff scheduling that allows for quiet, uninterrupted time to compound allergy treatment prescriptions
MARKETING YOUR ALLERGY IMMUNOTHERAPY SERVICES

First, you will need to determine whether you wish to market your allergy practice only to your existing patient base or beyond. Then, you will need to determine a budget for advertising your allergy services. Areas for consideration are:

**Existing Patient Base**
- Telephone on-hold message
- Invoice insert
- Waiting area placard/brochure
- Web site announcement

**Beyond Existing Patient Base**
- Mailing to local primary care physicians (GPs/FPs/IMs/DOs/Peds)
- Personal phone calls to referring physicians
- Web site announcement
- Participate in local co-op advertising groups
- Advertising
  - Radio
  - Newspaper
  - Television
At GREER®, we understand the challenges ENT specialists face as they develop successful allergy practices. GREER has helped other practices like yours to start up or grow their practice of allergy by providing counsel and support. We begin by assessing your practice needs and lining up the appropriate resources.

GREER partners with ENT customers to meet the specific needs of each practice. Our knowledgeable service team consists of Allergy Sales Consultants, Customer Care Specialists, physicians, nurse practitioners, pharmacists, immunologists, microbiologists, entomologists, and chemists who are available to answer your questions about allergy immunotherapy. GREER will apply this knowledge base for you by:

- Assisting with practice set-up
- Recommending regionally appropriate allergens for testing panels
- Determining devices and supplies needed for selected allergy testing methods
- Performing staff training for GREER skin testing devices
- Reviewing treatment preparation options and providing necessary staff training
- Counseling on treatment dosing
- Compounding patient prescriptions
- Providing access to economic tools to help with business decisions
- Providing a practice resource tool to aid in practice management and marketing
- Being available for ongoing consultation

Your GREER service team will be composed of your

- Allergy Sales Consultant
- Medical & Scientific Affairs team
- Customer Care Specialist
The GREER® service team is within reach to assist you. Please contact us to get started with your Otolaryngic allergy practice.

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Visit our web site, [www.greerlabs.com](http://www.greerlabs.com) and click on **Contact Us** to find your representative.

**Allergy Sales Consultant**

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**Customer Care Specialist**

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