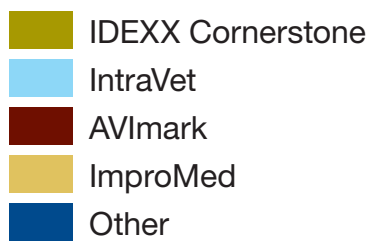


# Tips for tracking compliance with your software

## Software use in Well-Managed Practices



Your practice management software is your biggest ally in overcoming low client compliance. By using it to track when clients follow your recommendations, you can see exactly where your practice is falling short. But many veterinarians fail to use their software to track compliance rates.

We went straight to the source for solutions to these problems—we asked a number of veterinary software companies how to best use their software to boost practices' compliance. Regardless of the software you use, the following tips—some software-specific, others general—will arm you with the tools you need to track your compliance. And if you'd like more advice about how to make the most of your software, contact the company—representatives will be happy to help. Ready, set, track!

### The top 3 problems solved

There are three main reasons practices fail to successfully use their software to track compliance, according to the Cornerstone Database Coach, which is a service offered to Cornerstone users. Here are the problems—and the software Coach's advice for solving them:

**1. No one at the practice possesses the knowledge to fully utilize the software's features—or train other team members to do so.**

To boost your practice's technological savvy, be sure to include technology requirements in your job descriptions and CE programs. This will ensure that you hire qualified team members, and it will allow you to cultivate—and discover—technological expertise in your team members.

**2. Practice management hasn't planned thoroughly enough for the implementation of new software, so there are glitches and team members' work is stalled.**

It's often confusing to introduce a new software program into your practice. To avoid some of the confusion, do your research and put your vendor's number on speed dial so you can easily contact a support person when questions arise. Most software companies run a help line so you can call with questions. And remember that you're leading by example. Keep a positive attitude when you hit snags and your staff will be less likely to bemoan the change.

**3. The practice simply doesn't purchase the necessary software or upgrades.**

Again, it's important to do your research. Be sure you're aware of your software's capabilities as well as its packages. If you want to improve your compliance—and increase your revenue—you must use an up-to-date software system.

## AVImark

### Tracking compliance

**List declined services.** Monitoring the services clients decline provides an excellent opportunity to increase your revenue. To do this in your AVImark software, enter any services the client declines in the patient's medical history, select each service name, then right click on "decline." You can also elect to include declined services on your invoices.

**Complete specific searches.** Custom searches allow you to drill down lots of information into usable segments. For example, you can search for clients who haven't visited your practice in the last year. After finding these specific people, consider sending them a targeted mailing inviting them back to your practice. This feature is also a smart way to generate advertisements.

### Following up and sending reminders

**Help your staff.** It's tough to remember which clients need follow-up calls or letters. Use your software to create a list of these clients and then encourage your team members to refer to it often. The list will provide contact information for the clients with pets that need a postsurgical checkup and for the clients who need reminders for upcoming appointments.

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## DVM Manager

### Tracking compliance

**Create reports.** With the Companion or Triple Crown upgrade packages, you can use this software to create reports that track the standards of care you've set up for your practice. For example, you could examine compliance rates for your senior canine standard. Create a daily report to compare your standard of care set to the actual care your senior canine patients received. These compliance reports also show the revenue you're losing by failing to follow your established standards of care.

### Following up and sending reminders

**Set up internal reminders.** To help your team members remember which patients they need to check in with, create follow-up actions for procedures and inventory items. For example, in DVM Manager specifically, go to Code Maintenance to set up a reminder for staff members to call an owner two days after sending a recommended diet home with the pet. Each time the diet code is charged in a transaction entry, the reminder will be automatically added to the appropriate day's follow-up list. It's best to print the follow-up list every morning.

*Used and adapted with permission of DVM Manager.*

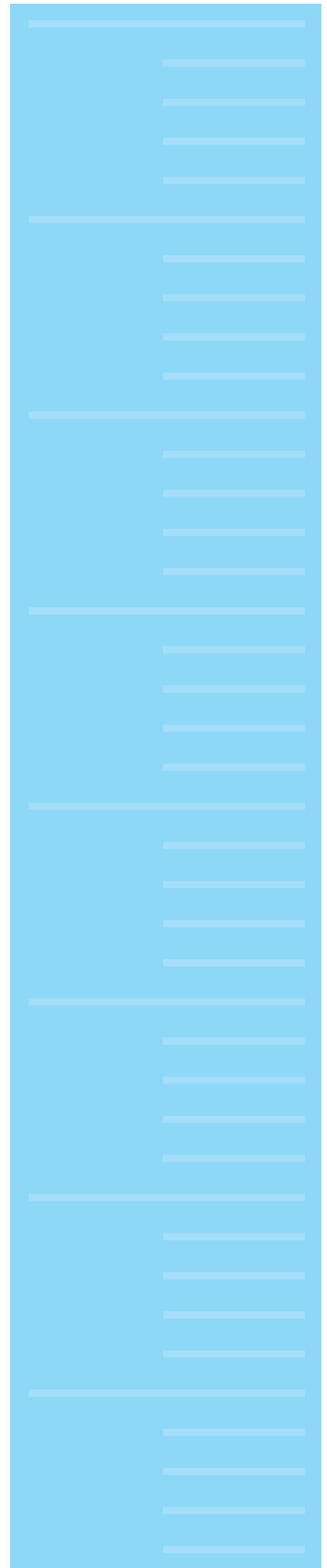
## Idexx Cornerstone

### Tracking compliance

**Identify standards of care.** The first step to successfully tracking compliance is identifying your practice's most important medical standards. Highlight the patient care routines that your practice completes most often and that are the biggest keys to your business. Then you must ensure you've set up the appropriate software features and naming conventions. To do this, create a "smart group" that encompasses the standards of care you'd like to track.

**Use "special actions."** The Cornerstone software includes various special actions that are helpful in tracking compliance. Invoice special actions help you identify missed charges. And you can track client recommendations and patient care with these features: departing instructions, weight updates, document printing (for client education documents), and feeding guides.

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## ImproMed Infinity

### Tracking compliance

**Creating lists and completing searches.** With this software system, you can create three types of compliance lists: recommended, deferred, and declined. Here are some suggestions for how to best use the lists.

**Include products.** It's smart to include product names and prices in these lists. Placing a product in the "recommended" list allows you to easily transfer it to an open invoice once the client elects to purchase the recommended item. If the client decides not to purchase the product, you can move the product name and price to the "declined" or "deferred" lists. This allows you to quickly see which products clients are buying and which they aren't—alerting you to the fact that you might need to better explain the value of some of your recommended products.

**Enter comments.** Each of the compliance lists allows you to include comments with each entry. It's smart to record critical details about the recommended procedures and products. Items included in any of the compliance lists, such as comments, are part of the pet's medical record and can be printed out as part of the client's invoice. This feature gives you the opportunity to present clients with a complete record of their pet's visit and file a detailed account in your own database.

**Customize searches.** Searching by specific product names, dates, and client or patient information allows you to easily find exactly what you're looking for. When you've completed your search, you can generate a report that displays the information in an easy-to-read format. For example, you could search for all 6-year-old and older canine patients that received a wellness exam in the last two months.

### Following up and sending reminders

**Send client reminders.** ImproMed's Schedule Communications feature allows you to send postcards, letters, or e-mails as client reminders. Plus you can easily follow up with clients about test results. The contact function is one especially convenient function. With it, you can program client information without the need to search. This function allows you to program these contacts without having to specifically search for them or incorporate them into regular vaccination reminders.

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