10 Tips to Optimize Your Office Workflow

Expect Amazing Results

You have a passion for feathers, scales, and downy fur. You are a leader in a respected veterinary practice. What you care most about are your patients. However, the continuously changing stressors of running a busy and high-quality office can be daunting. For many small to medium-sized practices, upkeep of patient charts, compliance with regulations, patient care, and efficient communication are a challenge to say the least. Electronic medical records and other types of digital communication are instrumental in assuring success in patient care and business objectives

*This white paper offers 10 strategies to manage workflow organization challenges common to most veterinary practices. With these strategies in place, you can focus on pet care **and** create efficient, effective organizational workflow.*

1. Use Electronic Veterinary Medical Records (EVMR) ⇒ Go Paperless

This is a specialized type of EMR for veterinary practice management. The Journal of the American Veterinary Medical Association published research on the high value of EVMR. It is used by many small, medium, and large veterinary practices for a variety functions. Depending on the needs of the individual practice, benefits include billing, treatment, surgical documentation, automated reminders, and health status. Still, researchers recommend that professionals go further and adopt EVMR for population health and to help detect some infectious diseases that might be occurring in the pet community. [1]

Many refer to the use of EVMR as a "paperless" process. There are many benefits to adopting this type of medical record system. These benefits include and are not limited to: organization, efficiency, thoroughness, and legibility. [2]

2. Take Advantage of Templates

Thoroughness, a must for any health care practice, is achieved with a template-based approach. This decreases chances that important steps in treatment protocols are not overlooked.[3] The templates you choose will vary depending on the patients that you serve and the functional needs of your office.

Look for a flexible template-based programs that mirrors actual medical charts, making it easier for doctors and other team members to enter important information and communicate with each other. Designed like separate files that one might see in a patient care chart, the templates are very easy to read and include:
- Appointment reminders
- Imaging and other test results
- Vaccination records
- Billing information
- Diagnoses and conditions
- Documentation (such as SOAP notes)
- And much *much* more!

Templates can be personalized to fit varied charting needs. **CLICK HERE** to learn more about a template-based system.

3. Make it Easy to Communicate

The old saying, "Communication is the Key" is quite true. Pet owners (or rather, parents) are impressed by being able to walk into the office with their beloved companion and learn that *any* team member has knowledge of important details. There is no longer a need to take turns to read a chart or enter notes. Health status, needs, and other information is accessible on every electronic device in the practice. So if a doctor writes a prescription while in the exam room, a technician will immediately be aware of the order and get the medication ready for pick-up. This will save your staff a great deal of time and assure an office environment that is relaxing and efficient. A good impression to any caring parent!

Remote access is the ability to read charts and enter documentation from a location outside of the office. This is especially helpful for veterinary practices in which providers need to travel to different locations. Even if you write an order or an important directive from home, your staff receives the information immediately.

4. Embrace Process Improvement

Researchers have spent decades trying to discover the best ways for businesses to save time and money, as well as to achieve the highest quality products and services. Rashid and Ahmed summarized several process improvement methods. Most veterinary practice managers have heard of them: Lean Thinking, Six-Sigma, and Total Quality Managment.[5]

The researchers also discussed a process improvement strategy called Super Methodology, which they stated may be more effective for small to mid-sized businesses. The focus is on the processes of the specific organization and on performance. Their investigations revealed two major strengths of Super Methodology. These are continuous improvement and potential to improve efficiency of operations.[6]

Super Methodology process improvement strategies may be the most effective for veterinary practices for a couple of reasons. First, it is more feasible for small to mid-size businesses, such as yours. Second, it is well-known that the needs of all patient care practices change continuously. Therefore, there must be room for flexibility. Unlike paper charts, electronic medical records can be changed with the help of the EMR consultants. For example, let's say that there are sudden changes to laws related to the use of controlled substances. Your EMR vendor can easily assist the practice manager in making necessary adjustments to the EVMRs and related templates. This will keep your organization in compliance and prevent dreaded audits and penalties. Most of all, it will keep your patients safe and maintain the trust of their parents.

5. Manage Changes in Workflow with Success...Because Every Day is Different

Every veterinarian, practice manager, and receptionist has suffered through chaotic days and nights at the office. But you are caring for patients, not working on an assembly line. Case in point:

You are a well-respected veterinarian who owns a medium-sized network of practices in a rural area. You serve a couple of farming communities and many individual family pet owners. You are scheduled for routine surgery at 8:00am. You get into your office early to prep and to review documentation. After providing anesthetic to the animal, the office manager gets and emergency call from a long-time customer, saying that her beloved dog appears is unresponsive. You send a technician out for the short-term but you know that this pet needs a licensed veterinarian. No time to call but you can send and emergency notification through your electronic communication system to ALL of your colleagues in your practice to see if someone can help. Someone gets the message and goes out to relieve the technician. In the meantime, because you are short a technician, 3 routine visits need to be cancelled. Your practice manager effectively and efficiently reschedules the patients with no endangerment to their health. You are able to focus on the patient that is waiting for you on the operating table. All of this is easily logged in the electronic medical record.

At the end of the day you are exhausted. Still, you and your hardworking team have provided the excellent services that your community deserves.

This scenario underscores the extreme expedience electronic medical records and related digital communications. With paper charts, typical phones, and panicked assistants running back and forth between treatment rooms, the final outcome of this very difficult day may have been quite different. But instead, you had a system that operated with thoroughness and effectiveness.

6. Know Your Desired Outcomes

It's always beneficial to have idea of what a high-quality workflow office look like to you. Keep in mind that there is no right or wrong response when it comes to figuring out what you want. At the same time don't get concerned if you can't answer such questions with precision. It could be that you have a vague sense that your staff does not have a good enough handle on the value of sending reminders for appointments. As a business owner *and someone who cares deeply about the patients that you serve,* this is of critical importance.

If you don't know your desired outcomes, talk to your colleagues. They are likely going through the same struggles. You can also do additional research in veterinary journals, newsletters, and blogs. Barbara Doty, DVM provides an excellent description of an average workday at her paperless practice. Some advantages are:
- Storing digital radiography
- Logging daily appetite when boarding animals
- Looking up pets that have certain illnesses, such as diabetes mellitus
- For prescriptions, integrating labeling, invoicing, and inventory needs 7

7. Know Your Potential Barriers

As with any new process, it may be difficult for some team members to make the transition without growing pains. Many doctors may still want to handwrite their notes. It could just be force of habit. The issue could very well be that some doctors cannot type quickly. Voice recognition solutions are available and designed to accurately translate the physician's voice into a rich, detailed narrative that feeds directly and seamlessly into all major EVMR platforms. These solutions offer the freedom and flexibility to complete patient notes at their convenience and dramatically reduce the amount of time spent on documentation. Certified Veterinary Practice Manager Judi Bailey recommends scheduling time to do their documentation, such as 10 minutes while the vet tech is assisting the next patient.[8]

We suggest that you help your colleagues understand that they are not alone. Some doctors admit they initially felt "vulnerable" not having a paper chart in their hands while discussing patient care. Eventually they learned the new process and are thrilled at having so much information at their fingertips.[9]

8. Keep Your Team Involved From the Beginning

Who on your team knows the most about the front desk? *Your receptionist.* Who knows the most about billing? *Your practice manager.* What about appointments? *Your scheduler.*

"*Each member of the staff plays an integral in the success of the practice. Many managers unfortunately assume that they must be 'too internal' about involving the entire team until a solid plan has been made. Soren Pommer, process consultant for Gluu states, "The trouble is that by involving people later you miss a great opportunity to win over their hearts and minds in favor of your initiative to gain the effect of change" (p. 1)*[10]

There are numerous negative consequences to not involving your entire practice team. First, if you plan something ahead of time, there is a good chance that it may not make sense to other team members. If you simply present ideas, or hypotheses to others in a way that encourages contribution, you reach a point of healthy collaboration. In short, you get positive employee engagement. This is a must for any business.

9. Offer Continuous Training and Support

As your veterinary team continues to become accustomed their paperless system, there may be some "growing pains" and questions. Therefore, it is important to choose an EVMR system that accommodates these needs. A top-notch technical support system will provide the following benefits:

- Consultation by well-trained and expert technicians
- Remote access to your desk top
- People who really listen to your problem

- Accurate diagnosis
- Immediate solutions

10. Continue to Expand the Possibilities

As your practice continues to become accustomed to their new workflow environment, you will see many positive changes. They will be energized by the improved organization and the chance to spend more time with patients and parents. We advise that you embrace a habit of continuous improvement. This is done by having regular brief "touch base" meetings to discuss problems and also to celebrate success. You may wish be more formal and conduct an employee survey and/or a customer survey to learn the strengths of your new system and potential areas of improvement. Your EMR vendor can help you expand to voice recognition, upload of imaging results into the EVMR, or establish communications with other practices and hospitals.

After adopting a paperless electronic medical records system for your veterinary practice, the team will not want to go back to stacks of paper charts, shuffling loose papers, and reading messy and hurried handwriting. Your team will shine with a calm and efficient workplace environment. Your customers will see the time that you can now dedicate to the sensitive and thorough care that you give to your patients.

PetTracks – An ally for veterinarians to promote **saving time and money** by avoiding more expensive electronic systems and the costs of paper records. From the makers of Amazing Charts, an award winning ("Best in KLAS") medical record solution used by medical practices across the country due to its usability and overall customer satisfaction, PetTracks EMR will provide great value to your veterinary clinic.

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A Harris Healthcare Company
1600 Division Rd. Suite 2000
West Warwick, RI 02893
ovlahou@harriscomputer.com

www.pettracksemr.com

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