

# Case Study: Tiffany Main, Practice Manager at Patton Veterinary Hospital, Red Lion, Pennsylvania, discusses her approach to the technology



## Searching for the Right Technology: A Practice Manager's Perspective

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As a practice manager at a thriving clinic, I'm well aware that technology plays an increasing role in our ability to provide quality pet care, serve our clients needs, and simultaneously grow our business. At the time I joined Patton Veterinary Hospital in 1999, the clinic had around a dozen staff members. We now have three full-time veterinarians and a total staff of 38 serving pets and clients throughout the Red Lion, Pennsylvania community.

Our success is due first to a skilled staff providing quality care in a uniquely inviting atmosphere. But smart business management and technology that supports clinic processes and goals has also played an important role in our growth. We recently underwent a major change – a transition to a new system - and our experience may provide useful tips to other clinics on how to plan for and execute a technology transition.

My perspective is based in part on my background. I didn't take the usual route to becoming a veterinary practice manager. My initial career focus was in human health services, where technology plays a big part in daily business management.

## Practice Management Systems Draw From Human Health-Care Design

Anyone who has worked in the U.S.-based human health field knows that the technology systems are largely built around

the need to satisfy insurance tracking and billing requirements. It's no surprise then, that many practice management systems developed for U.S.-based veterinary clinics drew from this model. In other words, a majority of veterinary practice management software available is centered on the invoicing system. Medical records are another matter. Many veterinarians, like many physicians, still rely heavily on hand-written medical records to chart and track a pet's care.

Like many clinics, we had a system in place that we had used for years. Eventually, it reached the point where our current technology was not only outdated but a real hindrance, so we finally bit the bullet and began searching for new technology that would support both our existing operation and goals for the future.

If there is any advice I could give, it is to clearly understand the factors that drive the success of your clinic, and to be aware of trends in veterinary care that will be important to your clinic's future growth. Factor these into the selection process. At Patton Veterinary, there were specific philosophies and goals important to us, and we needed a system that would help us support these:

- **Staying close to our clients:** With rocking chairs on our wrap-around front porch, and a "comfort room" with a separate exit for grieving clients, Patton Vet is known as a clinic that provides a uniquely warm environment for clients and their pets – from the time they step through the front door to the minute they leave our clinic. Despite our significant growth over the years, Dr. Schmidt is intent on maintaining that air of warmth, and an ongoing, close contact with our clients. We needed a system that would help capture and track information in a way that

supported our highly personal approach to veterinary medicine.

- **Closing the Compliance Gap:** Like all clinics, we have quality standards of care that we strive to maintain consistently. But with hand-written medical records and an inconsistent ability to automate and track necessary medical record information, we weren't able to ensure that our clients and the pets we treat always received that standard of care. We needed a system that would help us close the compliance gap.

- **Client education:** It is our job not only to fix what's broken, but to prevent medical problems from developing. We accomplish this by adhering to quality-of-care standards in our treatment protocols – and by educating clients. After all, we may see a pet two or three times a year – the rest of the time, the care of that pet is up to the pet owner. A system that supports our focus on client communication and education was an important selection factor.

- **Behavioral services** – Thousands of pets a year are given away or put down due to behavioral problems. If, for example, a cat is urinating outside the litter box and no underlying medical cause is found, pet owners become frustrated and discouraged. We have a behavioral coordinator who works with our vets and maintains close contact with clients once they've left the clinic. This is an area within veterinary medicine where there is a real need – and one that we are focusing on as a specialty service to our clients. A system that could be customized to support our focus on behavioral as well as physical care was important to us.

- **Business Tracking/Reporting:** Based on my strong business management background, I've always been aware that a

practice management system with flexible reporting options is key to analyzing the clinic's operations, then determining both strengths and areas for improvement. We needed a system that allowed us to slice and dice reporting criteria in ways that put our own business processes under the microscope.

### The Search: Don't Shy From Changing Your Mind

Once all selection criteria were set, I began the search for our next practice management system. Over the next 18 months, I looked in depth at around a dozen system alternatives and learned more than I ever thought I could know about "feature/function". I had even come to an initial decision on a system choice when fate and a lucky visit to an industry conference intervened.

First, an industry consultant suggested that I take a look at an international vendor relatively new to the U.S.: RxWorks. I obtained a demo disk that definitely tweaked my interest. Then, at a veterinary conference where RxWorks and other vendors were exhibiting, I had the chance first-hand to compare available systems. One of our vets was also at the show, and we both agreed that RxWorks was the hands-down choice for us. Why? Because it was centered not on invoicing, but on medical records. It offered us the chance to capture, track and report on a wide array of information that would support our established standards of care, and provide the highly personalized medical, behavioral, and educational support we needed to serve our clients.

### The Transition: A train-the-trainer approach

With nine workstations and 38 staff, the training was as critical as the software and hardware conversion. While all

staff were excited about the potential of a new system, change is scary, and we approached the transition with education clearly in mind. All staff viewed an RxWorks' training CD prior to conversion – we use the CD now to help prepare new staff. The conversion itself took only two days. During that time, RxWorks conducted group training sessions and one-to-one education. On day two of the conversion, select staff members, (myself included), learned more about specific functions and became the focal point for coaching other staff members. For example, our inventory manager dug into the specifics of related system features, then became the "go-to" person for other staff members involved in inventory management. This approach worked well for us, and since we place heavy emphasis on internal education, we continue to learn more about the system both through daily use and periodic staff sessions led by our training coordinator.

### The Early Results are In

Our new system was installed in December 2004. With a scant three months of activity, we can't yet pinpoint the hard facts and figures that will underscore the benefits of our new technology. What I can say is this. There's not a day that goes by that we don't learn of something new that will benefit us over the long-term – innovative access to medical record data, a way of tracking and customizing information to better serve our customers, the ability to set alerts that help improved quality standards of care – and decrease missed charges.

As to the reporting function – I have yet to find anything I can't report on! The system allows you to break down reporting criteria to the finest level. For example, you can run a report giving you the average transaction fee for felines, or canines – or even felines over a certain age. You can cross-compare pieces of information, then link the data into Microsoft applications like Excel. The data that we have determined

so far regarding fixed versus variable fees has already allowed us to alter our fee structure in ways that better serves our clients and our business.

Another major strength is the ability of the RxWorks system to mirror our clinic workflow and to enable a truly paperless environment. The pet's record moves from workstation to workstation as the pet moves from place to place around the clinic. Notes are kept on the system, not on handwritten charts. The ability to attach information electronically to a pet or client's record has also helped us to understand more than ever before that there is really no need for paper! As we learn more about workflow automation, we will move toward a truly paperless environment – a huge leap forward in efficiency and client service.

### A View of the Future

The flexibility of today's technology means that our system will remain viable for years to come. We're already talking with RxWorks about enhancements that will serve our clinic goals and provide an even better means for optimizing our medical records-based system. And that's the final point I would stress. Whatever your goals, the size of your clinic, the makeup of your clientele, no technology can serve you well without a true partnership between you and your vendor.

With the right system in place, a solid approach to staff training, the right vendor relationship, and the ongoing advice and help of independent industry consultants, the sky's the limit in terms of practice management possibilities.



About Patton Veterinary Hospital:  
425 East Broadway  
Red Lion, Pennsylvania

Established: 1925, owners since 1993: Dr. and Mrs. Douglas Schmidt

Focus: Companion animals, birds, reptiles; wellness exams, dentistry, radiology, soft tissue/orthopedic surgery, micro chipping, behavioral services, lab services, boarding, artificial insemination

Practice Management System: RxWorks