

Welcome

A big welcome to *RxWorks Update*. This newsletter will be produced periodically and is intended to provide a regular mix of tips and ideas for better use of RxWorks, as well as development and other news from RxWorks. We hope you will find it useful and stimulating.

In this issue:

Standards of Care and how to implement this within RxWorks, pages 2/3.

Rohan Gladman examines Client Ratings and their use, page two

Mal Young begins a series of short articles on useful reports to run, page four.

Please use the Members Area to view topics raised by your fellow RxWorks users and contribute. If you have any comments to make on Update please email us at: editor@rxworks.com

How to log Support Cases from Dave Healy, RxWorks Support Manager

As you are probably aware we have been making changes in the last year to the way support requests get logged. Many of you have taken to the idea of logging your support requests on-line and using the Self-Service portal. This has improved our ability to provide support faster and more effectively. By using this method to log requests, it reduces waiting time and the telephone tennis that often occurs.

I encourage all clients to log onto the Members Area and take advantage of the Self-Service portal. We appreciate that you are busy but proper use of the members portal will reduce time spent calling support and return phone calls. In addition you can monitor progress and action on your case. Sometimes you might think nothing is happening – the reality is often different and the action being taken is fully transparent via the Self-Service portal.

When using the Members Area to log support calls it is important to give us as much information as possible. The more information you can give us the faster we can process your request and resolve the case. Include information such as Client name and Client number, Patient name, Patient number, report names, terminal names, the process taken, etc. This will help us produce a quick resolution to your case.

New Release: Version 3.7


Click here for the detailed 3.7 Release Notes

The roll-out of RxWorks version 3.7, started on March 31st and has been well received by those clients who have been upgraded. If you have not yet had the upgrade and are keen to get the latest version as quickly as possible, please lodge a support case via the Self-Service portal. Please remember, because of the new functionality and features, you will need a reasonably new fileserver to successfully upgrade to version 3.7. If you are unsure please ask your account manager for advice.

Here are some of the principal features of the new version (detailed in a document we sent by email at the end of March):

- **A Patient Record Card (shown opposite):** Gives a print-out of the current status of a patient's healthcare indicators and reminders and is available to print from the patient/visit screens of any species with HealthCare turned on. It can also be added as an option to print from a clipboard or attached to any document print-out. We feel sure this will be an invaluable additional tool in client communications leading to client retention and loyalty.
- **HealthCare Indicators:** Can now be resolved via procedures as well as individual items.
- **SMS/Text Messaging:** Can be sent to remind clients of upcoming appointments. You can schedule an SMS message to send say an hour before an appointment, one day before the appointment etc. Several clients report good results from implementing this new feature.
- **A Summary Panel:** Gives an overview of the client and patient details. It is displayed to the left of the medical record report and is available in the main application by clicking List on the Visit Screen. It is also available in Mobile (Patient History from the main screen).
- **New PDF Functionality:** Crystal 11 Reports allow export of all documentation to PDF. Any report screens which have a toolbar will now have a PDF icon to export straight to Adobe without previewing the report first. It can also be done through the normal Crystal export method. This feature will be especially useful for Patient Histories.
- **Incomplete Invoices:** For clinics concerned about incomplete invoices being forgotten and left unpaid, when Payment is clicked in the financial screen and any incomplete visits exist for the client, a summary will appear allowing the user to go to the visit and finalise it if necessary.

Click on the link, top right above, to access the full Release Notes.

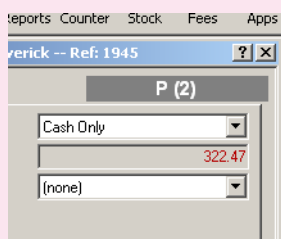
Patient Report Card for Nelson Abbott	
BREED	Labrador Dog
D.O.B.	09/08/1999
AGE	8 Years
SEX	Male
CLOUR	Gold
WEIGHT	31.0 Kg
OWNER	Mr & Mrs Doug & Dianne Abbott
	
HealthCare Summary	
<p>Overdue Healthcare Indicators</p> <p>07/11/2005 Worming (24 Weeks overdue) 07/08/2005 Fleas (8 Months overdue)</p> <p>Due Soon Healthcare Indicators</p> <p>07/05/2006 Vaccination 07/05/2006 Rabies</p> <p>Healthcare Indicators to be Reviewed</p> <p>Health Check Heartworm Fecal Float Dental Food & Diet Tick</p>	
Wellness Program	
<p>07/05/2006 Rabies Vaccination 07/05/2006 Annual Vaccination 07/11/2005 Worming 07/08/2005 Fleas Prevention (3m)</p>	
Next Appointment	
Please discuss Nelson's next appointment with reception staff	

SNAPSHOT

Rohan Gladman looks at useful, but often under-used features in RxWorks. In this issue:

CLIENT RATINGS

It is generally recognised that the top 20% of your clients generate up to 80% of your income. Clients are ranked as platinum, gold, silver and bronze according to their level of spending during a period that you specify. Start to recognise this by looking at your client rankings, top right of the client screen.



A P2 client, as above, is a Platinum client, ranked second in your client ranking database, i.e. your second highest spender. This means everything

to you, but avoids potential embarrassment if your client looks at the screen.

You can change the way you analyse your client rankings.

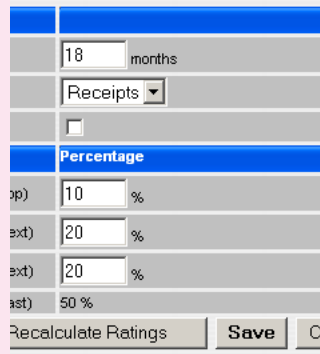
Task Panel | Tools & Utilities | Set client Ratings.

A suggested time-frame for the calculation is 18 months which will pick up clients who normally come in annually but who are a couple of months overdue for their annual vaccinations.

My other suggestion is to put the setting to Receipt, rather than Invoice i.e. base your rankings on actual monies received.

You can identify your P, G, S, B clients by going to the client screen and clicking List. This list can be sorted on the rating column and gives you a snapshot of how many clients are in each category.

This is an effective tool for identifying your clients in day to day situations, as well as enhancing your marketing activities.



Define Your Own Standards of Care

RxWorks has the tool, HealthCare Manager, to let you do this

by Bryan Williams, RxWorks' General Manager in the US

Bryan has experience as a practice manager and has worked in application development and operations for a variety of professional services

It is generally agreed that veterinary medicine is changing from concentrating on curative treatments to more preventative methods. This in turn has prompted individual practices and professional organizations to develop Standards of Care for their patients.

Standards of Care can be simply described as recommendations for exams, rechecks, testing and treatments, parasite control, good food and vaccinations. These depend on the patient's species, age, weight and other factors that are determined by the practice. Another way to describe them is that they are the Standards of Care that your practice feels are essential in keeping the patient in an optimum healthy condition.

Studies have shown that lack of compliance to Standards of Care is one of the biggest contributors to limiting the revenues a practice can earn - as well as lowering the standard of care that you are providing your patients. One US study calculated that if an average practice (2.2 FTE Veterinarians), increased their clients' acceptance of the standards by only 10%, the annual profit would grow by around \$80,000! Not an impossible task and not a bad return.

A goal of every practice is to strengthen the bond between the client and the practice. A strong bond results in increased client loyalty and increased patient visits with healthier patients and increased revenues. Standards of Care are a powerful tool in achieving that goal.

There are three main prerequisites for establishing successful Standards of Care in your practice:

- 1) Establish the Standards of Care that your practice considers are best for patients.
- 2) Have accurate up-to-date information on the patient's compliance with your Standards, whenever you are talking to the client.
- 3) Educate both the client and your staff on the necessity for the Standards to ensure the patient is kept in good health.

It is beyond the scope and the capability of RxWorks (and most practice managers!), to determine the Standards for your practice. We can only help in helping you improve your client's acceptance.

Accurate Up-to-Date Information

Most practice management systems do an excellent job in maintaining financial transaction details. However, to accomplish the tasks needed to implement a Standards of Care system, other more comprehensive functions are needed.

RxWorks provides the following, which are absolutely necessary in managing Standards. You should make sure that you have a good knowledge of each.

- Functions to record clinical notes, treatments, findings, lab results, charts, x-rays, etc. along with charges
- Tools to define the Standards for each species that you treat
- The capability to automatically record dates when procedures, exams, tests and vaccinations are due
- Tools for recording diet compliance and parasite control

Don't miss Malcolm Young's
Tip of the Week
each week on the Members Forum

Standards of Care .. Continued from page 2

information

- Tools to pre-define protocols for treatments
- Automatic reminders to clients of upcoming visits – including 2nd, 3rd and even 4th reminders - and the ability to change the form of reminder – postcard, letter, e-mail, telephone or SMS (text messaging for cell phones)
- A method of measuring the effectiveness of the reminders in getting the client to respond to the recommendation
- A way of reminding the staff of the patient's status with the standards, every time they are in contact with the client
- Providing staff with information that should be provided to the client on each of the standards for your practice
- Monitoring that your standards have been discussed with the client and have either been accepted, deferred or refused by the client.
- Automatic printing of take-home instructions and information sheets for the client.

RxWorks maintains the information needed to manage Standards of Care in its HealthCare Manager. It also manages Reminders in a separate function. An obvious question is what is the difference between the HealthCare Manager and Reminders? And why have both?

Reminders and HealthCare Manager

Let's refresh ourselves on Reminders. Reminders are set to be sent to the client on the anniversary of a particular treatment, such as vaccination. They are based on a pre-defined time interval – one year, six months, etc. They are predictable and relatively easy to manage.

If managed effectively, they play a significant role in increasing the bond between the practice and client.

What does the HealthCare Manager do?

It provides information to the practice staff when there is any direct contact

with the client – the client calls or they come in to the practice. There is no pre-defined time as the “event” can happen at any time. The timing is totally outside of your control and cannot be anticipated and therefore scheduled and managed in the same way as Reminders.

So the Reminders are time-driven and the HealthCare Manager is event-driven.

As both of them happen in a practice, they are both needed to effectively manage the communication of the Standards of Care to the client and patient.



Applying consistent Standards of Care leads to better healthcare and greater clinic profits

Staff Concerns

One of the common concerns in a veterinary practice is finding and keeping good qualified support personnel. Staff turnover is typically a way of life in a veterinary practice. This leads to continual training of new staff and reinforcing the knowledge of existing staff. The task is compounded in the practice that is utilizing Standards of Care as a core business function.

All staff need to understand and be able to relate the benefits of having Standards, especially their effect on the quality of care you are delivering to the patient.

When contact is made with the client, the compliance status of the patient is automatically displayed. But to make sure that the client hears a consistent message, RxWorks' HealthCare Manager provides facilities to define a “script” that

explains why the Standard is necessary. The script can be displayed so that they can give the practice “message” to the client explaining why the treatment should be done. This consistency helps avoid confusion in the client's mind and should lead to a higher rate of acceptance. Indications from clinics that have adopted HealthCare Manager show that this is having marked increases on compliance and sales of basics for fleas, wormers and food stuffs.

Measuring Client Acceptance

In order to manage how effective you are in getting acceptance of your Standards, we have to record the decisions made by the client. RxWorks requires that these be recorded before you can finalize a visit. This is for two purposes:

1. The client's decision on your recommendation is recorded in the patient's medical record, for later review in the case of any dispute.
2. You can produce reports on the percentages of acceptance and just as important, analysis of the reasons why they are not accepting. The latter is very useful in helping you fine-tune your scripted message to improve acceptance.

To have only historical reports showing what standard treatments have not been accepted, is akin to closing the stable door after the horse has bolted. You need to have information on the patient's care status at the time the patient is about to be treated, or you may have to wait for another year before the opportunity arises again. And we all know that everyone will remember a year later that the treatment wasn't done!

To obtain more information about RxWorks' HealthCare Manager contact your Account Manager.

Thought for the day....

Strong leadership is a hallmark of a successful practice. A leader should have the vision that drives the practice forward – a manager facilitates that vision by creating the atmosphere in which it can be achieved. In veterinary practice, the leader and manager are often the same person.

*Source:
Managing a Veterinary Practice
Caroline Jeuring*

Report Techniques

Mal Young examines a range of useful reports and some suggested time ranges.

Over 100,000 reports are potentially available from RxWorks – a rather daunting prospect. Below I present a range of reports that you might consider running daily, weekly and monthly. This is presented for consideration only and you may have other reports you use on a regular basis. Why not contribute to the Members Forum to share these with other users. Let's get a debate going on some of the other reports you use each week/month!

In the next issue of *RxWorks Update* I shall look at annual and intermittent reports as well as other useful business reporting functions available.

Daily

1 *A1 - Till Balance*

2 *A2 - Banking*

3 *A3 - Incomplete Invoices*

4 *A4 - Account Movement. Both versions have advantages.*

Weekly/Fortnightly

1 *'Welcome to Clinic letters'* to new clients. This can be done as a mail merge (Reports F) using "Date entered on computer" as the criteria.

2 *Reminders* – some run these monthly, some weekly. The advantage of weekly is it evens out the flow of clients visiting because of reminders and it's more precise, especially if you use four week reminders for booster vaccinations.

3 *Desexing Letters*. This can be done as a mail merge (Reports F) using "Date of Birth" between 5 & 6 months ago and Desexing Indicator = "negative" as the criteria.

Monthly

1 *B3 - Client Transaction Summary*. This is an aged debtor listing which is useful to run and peruse for errors prior to running monthly account statements. Also helps debt control as you can make decisions on who needs phone reminders, who needs a stern letter or changing to a bad debtor etc.

2 *B1 - Account Statements*

3 *B4 - Bad Debtor*. Evaluate status of these clients, some may need notes changed or removed. Some may need bad debts written off.

4 *B4 - Special Payment Terms*. Evaluate status of these clients. Circumstances requiring these notes may have expired.

5 *E3 Statistical Reports*

a. *Vet/Doctor Performance* – use date range "Last Month", Doctor Across the page, Service down the page. For average invoice use Doctor/Vet down the page and anything across the page.

b. *Monthly Income Comparison* – 12 or 24 month period, Monthly across the page, Service down the page.

c. *Mixed Practice Comparisons* – use date range "Last Month", Species down the page, Species Type across the page.

d. *Practice Analysis for multi branch practices* - use date range "Last Month", Service down the page, Clinic across the page.

e. *Monthly Income Comparison for Multi Branch Practice* – 12 or 24 month period, Monthly across the page, Clinic down the page.



Rxround-up

NL: February saw the inaugural Dutch Users Conference over two days near Arnhem with a combination of industry talks and more practical sessions on the use of RxWorks.



UK: February, RxWorks hosted its first UK Users Conference at the Hilton Metropole at

Birmingham's NEC. Like the Arnhem Conference held the week before, it too was held over two days and combined general industry presentations by leading consultants with more practical sessions on day two on topics such as Reminders, Procedures, Data mining etc.



US: A Practice Managers' Roundtable was held in the Las Vegas Office in March. It was generally well received. "Very Informative, and well presented so that it enabled each of us to get all of our specific needs covered". "Extremely beneficial to network with others clinics...to find out how they are using RxWorks, and help with some of the ways we are using it".



AUS: The RxWorks Brisbane office has moved 300 metres down the road to larger premises. General Manager Doug Fletcher says; "We had outgrown the old premises some time ago and our new office will allow for future expansion."



UK: Movers - Rohan Gladman returns to the Brisbane office after two years in the UK. He will be available for telephone training sessions for all clients both in Aus, Europe and the US. Ask your account manager for details.



UK: Patrick Ribouet and Paul Keith have recently joined the UK Support Office. Both Patrick and Paul have IT support backgrounds. Ieuan Morgan has recently been appointed as Account Manager for UK and NL. Ieuan will be contacting all clients to introduce himself over the coming months.



US: Kurt Lucas has joined the US Office as Hardware Support Technician. He brings a number of years experience to the position.

SEE YOU AT ...

US: **June:** American College of Vet Internal Medicine, Louisville

July: American Vet Medical Association, Hawaii

August: Central Vet Conference, Kansas City

NZ: **May:** NZVA Conference

AUS: **May:** AVA, Hobart

August: ASAVA, Alice Springs, Bain Fallon, Coffs Harbour
AVPMA Conference

August: RxWorks Conference

Use the MEMBERS FORUM for ... ENHANCEMENT REQUESTS ... TIP OF THE WEEK ... THREADS ON MANY SUBJECTS ... and much more



Mal Young delivers a training session as part of the Dutch Users Conference



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