RxWorks UPDATE

The RxWorks Newsletter: 2006 Vol 2

New Release: Version 3.8

Here are details of the major new features in RxWorks version 3.8 released September 30 2006. Please refer for full details to the Release Notes (click on the yellow box opposite).

Procedures: A number of enhancements have been made to the Procedures module and a new Invoice Style has been developed that groups charges by Procedure. This applies to invoices printed from the Financial screen as well as invoices included with account statements. These enhancements include:

- Procedures can now belong to a service heading which allows you to select a procedure to charge in the same manner as a discrete item.
- A new Invoice Style is available which groups charges by procedure and uses the procedure name as the heading.
- Each procedure can be fine-tuned to show a range of details on the invoice, including Procedure Printed Notes.

You can enjoy the benefit of has been developed to automate and streamline the process of calling clients after a visit or surgery. Recalls can be generated automatically based on invoice items in a similar manner to conventional reminders such as vaccination reminders. Recalls can also be set manually, and you can have an unlimited number of recall types.

When the Client Recall List is opened, calls due or overdue are listed excepting that recalls due on Saturday and Sunday are rescheduled automatically for Monday. When the recall is made it can be marked as Resolved. The record is then removed from the list and any notes made in the course of the call are appended to the relevant visit.

HealthCare Indicators: For those using HealthCare Manager, a number of HealthCare indicators have been renamed and a number of new HealthCare Indicators have been added. As well you can now define HealthCare indicators as Primary or Secondary, the mandatory in both screens. This may be useful if you want to track (for marketing purposes) all new clients.

Click here for the detailed 3.8 Release Notes

Patient Names: Provision has been made for patients to have two additional names, of particular benefit for equine practices.

Visit Screen: Visit type-ahead can now be accessed using codes to allow common acronyms to be automatically converted into full text. For example you could have the code BAR automatically converting into bright alert and responsive in your history notes.

Appointments & Clipboard Groups by Clinic: A new structure for clipboards in multi-site practice reduces screen clutter, reduces mistakes by using the wrong clipboard and more easily allows structure of appointment screens to be independent between branches.

Reports: You can set-up custom remittance slips for account statements. These will print at the base of the statement and should encourage some clients to make payment against their card. This uses a graphic file which can be set-up using a graphic package such as Microsoft Paint.

- Incomplete Visit Option: All Worksheets can be imported into the main database as Incomplete Visits. This is particularly useful if you want to review recent work, check charges, print handouts etc. Incomplete visits can be found by using the Find button on any visit

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In This Issue ...

Welcome to *RxWorks Update* vol 2. This newsletter is designed to be read both on-screen and printed. We hope it will act, principally, as a stimulant to encourage you to explore aspects of your RxWorks system that you might not be using.

Better Practice on page 2 introduces you to our new eLearning courses, which will be expanded over the coming months - click on the hyperlink to download the HealthCare Manager course.

Mal Young (*Report Techniques* page 4) looks at annual and intermittent reports. With Christmas fast approaching he looks at how to pull off your top clients' names and addresses.

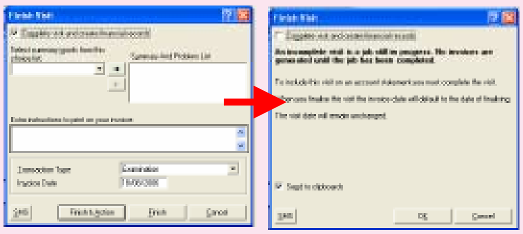
If you have any comments or suggestions for future content in *RxWorks Update*, please email us at: editor@rxworks.com

SNAPSHOT

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

INCOMPLETE VISITS

Often a patient requires many treatments for a single visit, especially when hospitalised. RxWorks allows you to deal with multiple consults by giving the option to incomplete a visit when saving your work.



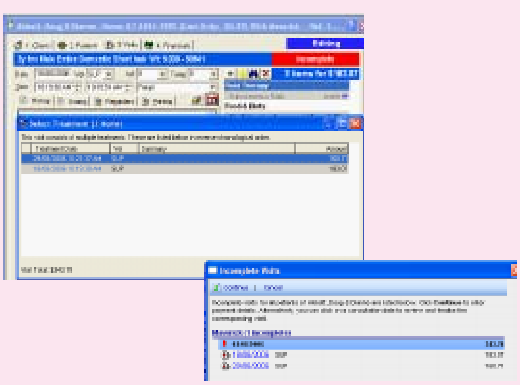
The shortcut for this is activated by pressing the spacebar in the Save dialogue.

By saving consults as incomplete, you can then invoice for a series of treatments to represent one overall visit to the hospital. Any invoices will automatically group the work together while still allowing the ability to track work entered by separate members of staff.

An incomplete visit is designed to show that until all work has been finalised, there is no transaction amount on the financial record.

You can always track the status of an incomplete consult by clicking on the red medicine bag on the consult screen (bottom left). When analysing Performance indicators, figures will show many treatments as one visit for the patient.

Since the release of RxWorks 3.7, any visits that are incomplete are highlighted when taking payment (bottom right).



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BETTER PRACTICE

A selection of ideas and downloadable PDF articles on better use of your RxWorks system

❑❑ **eLearning Courses:** RxWorks is pleased to announce the introduction of our first eLearning Course - on HealthCare Manager. To download this free course click on this link.
The eLearning courses, designed by Rohan Gladman will be expanded over the coming months and are designed to give you a clearer understanding of your RxWorks system.

❑❑ **Backups** – your data IS your business: Do you understand the RxWorks daily backup? Are you checking that your fileserver backup has worked each day? To do this click on Start and Option 6. Check that's today's date is listed against the Image of C, F and R. If it is not correct contact Support immediately to report this and we will investigate further.
RxWorks has a number of vital backup routines built into the system. Print-off this important document for a full understanding of your backup routine in RxWorks. Click Here to access the Backup article, third down.

❑❑ **5 Steps to Inventory Control -**
1. Allocate your preferred supplier to each stock item
2. Ensure your fees have correct stock order codes for your supplier
3. Ensure you have setup ideal and critical on hand levels
4. Adjust your fees by doing a stock take.
5. Configure your RxWorks Supplier to use online ordering. Use Wizards to apply. Click Here to access the Inventory article, second down.

❑❑ **New Staff -** When new staff join the clinic it can be a problem getting them trained in your systems and processes, not least RxWorks. We can help here with a demonstration CD and 'Discovery Pack' manual that is attractivley produced and easy to understand. Send the new staff member the CD and manual and not only will they be impressed with your organisation, they should start their new job with at least some understanding of the basics of RxWorks.
Ask you Account Manager for the CD and Discovery Pack manual.

❑❑ **NL -** Some Dutch clients may be unaware that RxWorks can read the electronic package slips from Aesculaap, AUV and Dopharma. If you wish to use this facility contact your supplier and ask them to email or use an FTP facility to get the file.

•*Continued from Front page*

screen and selecting the Incomplete check box.

NVS FTP Interface: The new interface allows NVS customers in the UK to submit stock orders to NVS using FTP across the internet, rather than the modem and dial-up. RxWorks automatically downloads NVS invoices when they become available so they can be used in your goods receipt process.

SVS Interface: A stock interface to SVS for New Zealand customers is now available. You can submit stock orders and update Cost Price for your inventory items.

Website: Now contains all the up-to-date manuals. eLearning courses are being developed over the course of the next few months and currently include Data Wizards, HealthCare Manager and Referral Clinics.

Is Marketing Necessary? by Bryan Williams

There is always an intellectual clash between being a professional and having to market your services. Fortunately in the veterinary profession, there is not the need to aggressively market to the general public. Most marketing efforts, other than yellow pages, reader boards, etc. are confined to existing clients and staff!

The practice has a portfolio of services and our objective is to make sure that they are all used by patients as they need them. This includes preventative treatments and procedures as well as those services for treating sick animals. There is no other way but marketing, to make this happen. The challenge is to make use of the information you already have, to effectively reach those clients that need your services.

There are two main ways of marketing to clients.

1. One-on–One discussions with client
2. Printed documents which now include e-mail and text messaging.

Personal Communication

The main objective of the communication is to explain to the client, the benefits of acting on the veterinarian's recommendations.

The authoritative communicators will always be the veterinarians as they have the ultimate responsibility for the patient and also the trust of the client. However, as studies have shown that people only retain 20% of what they hear, it's obvious that multiple conversations have to take place to ensure the message is understood. All of the practice's staff who are in contact with the client, must be capable of reinforcing the doctor's recommendations. RxWorks' Healthcare Manager plays an important role in these activities.

Printed Communications

These take the form of client handouts, take-home instructions, reminders, targeted market letters (dental services, senior screens, etc.) and let's not forget invoices.

All of these have one common requirement. They must NOT rely on a manual procedure. If we depend on manual tasks, we can almost guarantee inconsistent operation and therefore ineffective communications. The documents should be produced automatically by the computer system according to a pre-defined process.

Service-generated Information

Client hand-outs and take-home instructions should be automatically printed when a particular service or medication is recorded. They should be presented as professionally as possible – using graphics to focus on important points. A significant client relationship advantage can be gained by inserting the client and pet's name within the text– making it a personal document. Marketing is as much about presentation as content.

Reminders

As the time span between the visit and the next scheduled service is typically more than a week, the information given to the client during the visit loses its impact as time passes. Reminders are necessary to ensure that attention is re-focused on the needs of the patient. A recent study showed that 90% of clients wish to be reminded and do not consider it an irritant as is believed by some veterinarians.

As with client handouts, reminders should be automatically produced at specified intervals. A manual process means an ineffective process. The reminder system must be able to send follow-up reminders at specified intervals. Typically people will respond by the third reminder, but the capability of scheduling four is needed. It is also accepted that different people respond quicker to specific types of reminders - traditional postcard, personal letters, e-mail, phone calls or text messages. RxWorks' reminder system will allow multiple follow-ups and varying formats.

It is just as critical to be able to monitor the effectiveness of each reminder as it is to send them out. RxWorks keeps statistics on the responses to reminders, so that you can fine-tune both the timing and the format.

Targeted Marketing

As the practice determines services that apply to a particular segment of their patient base, letters or other information pieces should be sent to the owners of those patients. The key facility needed is a comprehensive search program that can identify and select those patients and clients who meet the profile for your service. This profile could be a combination of many pieces of information from the client, patient, visit, treatment, diagnosis,… and so on. Client hand-outs must allow for images, graphics and insertion of the personal data of the client and patient. This is a marketing piece and form is very, very important.

The Invoice

The most common client communication piece in any practice and its marketing potential is typically not used effectively. This is the one document most clients are guaranteed to read and if you are not using it to send a marketing message, a massive opportunity is being missed.

Add news about new services, special offers, courses attended by your staff and other topics that show the experience and capability of your practice. And change the marketing message at least once per month.

Summary

Is the effort required to market your services worth it?

As approximately 80% of your revenues probably come from repeat clients, your client and patient database is one of the most valuable assets your practice owns. "Mining" the information contained in it, will create opportunities to increase the use of your services, improve the quality of care and almost by default increase your revenues.

Report Techniques

Mal Young continues his look at Reports and a range of useful annual and intermittent reports.

Annual

1 Christmas Cards –query to produce list, letters or address labels of your top 200 (your choice) clients.

1. Click on the Reports button
2. Click on Query and Export Data from the menu
3. In the select listing drop down box select Client Details which means you are going to get only unique Client records.
4. Set the field to be searched to Client, the Criteria to Rating, less than or equal to, and in the textbox enter the number 200.
5. Click Add.
6. Click on Execute.
7. Choose the output option that is relevant to your query, eg, account details, address details, etc. You can Export these to Excel for editing as well.
8. You can also Save the Query for future use and save yourself the effort in designing a query.

(This explanation is taken from the KnowledgeBase article. Click here and click into Category, select Query & Export Data. Go to item 20 at bottom of list.)

2 Reports for your accountant.
Many practices use E3 – period Last Financial Year, Income Group down the page, Doctor Across the page

3 C2 – Inventory (Stock) Valuation.
You need to be using the full RxWorks inventory module correctly to run this report.

4 C4 – as for Monthly but better overview.

Intermittent

1 A5 – Full Details of All Visit records.
Useful to see details of what was done on a day you were away, keep an eye on how doctors are charging and discounting, especially new employees or new graduates.

2 C4 - Item Usage Analysis to track batch numbers and sales of products to individual clients or patients

3 C4 - Client Usage Analysis to track batch numbers and sales to a particular client

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Rx round-up

Malaysia: August: RxWorks appointed the Animal Medical Centre as distributors in Malaysia. Doug Fletcher of RxWorks (right) along with Ms Nimala of AMC attended the Veterinary Association, Malaysia conference in Kuala Lumpur where he spoke on the role of technology in the veterinary industry.

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NL: The Dutch User Conference will be held on Feb 23 - 24 2007. Details will be sent to you shortly and we hope you will put this date in your diary.

❑❑ **US:** A Practice Managers round-table will be held in Las Vegas on November 13th and 14th, facilitated by Mal Young.

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UK: Mal Young will be doing a series of Practice Managers' round-tables in the Newbury, Leeds and Edinburgh areas during the weeks of November 20 - November 30. If you wish to attend one of these sessions, which have proved very popular in Australia and US, please ring Emma for details on 01635 860557.

UK: Details will be sent shortly about the UK User Conference which will be held at the Belfry, Birmingham in March on Friday 2nd and Saturday 3rd. We have secured very good overnight rates and we hope you will put these dates in your 2007 diary.

UK: Great Western Referrals in Swindon held the first South Western User Group Meeting, with seven practices represented. The session covered Fees, Procedures and Clipboards. The next meeting is held on November 29th from 2pm. If you would like to attend please email Neil Frorbes at GWR: neil.forbes@gwreferrals.co.uk

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AUS: Australian user groups will commence in February 2006. These will be held in the new Brisbane office and notification to our clients will be sent in November seeking expressions of interest from those who would like to attend. The 3rd Australian RxWorks conference will be held next August with dates, venues and subject matter to be notified.

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RxWorks will be at the following conferences during November, December & 2007:

NL: Nov 20 - 22, Frans Bernsden and Anja Dijkstra of RxWorks will be attending the Groep Groot Dagen large animal conference.
AUS: AVA May Melbourne; WSAVA August Sydney; Bain Fallon August Perth.
NZ: NZVA May Christchurch; Sheep/Beef/Equine June Palmerston North.
USA: AAEP San Antonio, Dec 3-5 2006 Texas; NAVC in Orlando, Fla Jan 12-17 2007; Western States Las Vegas, Nevada Feb 18-22,2007
AAHA in Denver, Colorado- March.
UK: Vetkit at Sandown Park, November 10- November 11; SPVS IT Day at the Hilton, Coventry, November 17; BSAVA April Birmingham.
Malaysia: VAM & MSAVA September 2007 Kuala Lumpur.

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