

## Get Team Members Involved in Improving Compliance

Consistency, client education and follow up are the three legs that support the compliance stool in your practice.

By Wendy S. Myers



Nancy Noncompliant arrives for her dog's wellness exam. Duke furiously scratches his right ear, which is red and smells of yeast. Then the dog bites at his hip where fleas are having a fiesta. A tick on his neck gorges on the all-you-can-eat smorgasbord it's found on the Labrador retriever. This parasite party will quickly end once veterinary professionals intervene. But how could the staff better protect Duke and turn Nancy Noncompliant into Nancy Neversaysno?

Compliance is an area every practice can improve. As a veterinary consultant, I help hospital teams develop a proactive approach, getting everyone involved. Here are my favorite strategies to get clients to say "YES!" to the services and products you recommend:

**1. Review records for compliance gaps.** Instead of just stacking tomorrow's medical records behind the reception counter, assign someone to review them for compliance gaps.

- What vaccines are due?
- What diagnostic tests are needed such as an intestinal parasite screen, heartworm and tick-borne disease test, wellness or senior screen, medication monitoring or feline leukemia test?
- When was the last time the client purchased heartworm, flea and tick preventatives?
- Are any medication refills needed?

The receptionist can note compliance areas in the medical record for the technician and doctor to address with the client tomorrow. For paperless practices, many veterinary software programs let you print a check-in report that flags overdue items. If you use a travel sheet, highlight needed products and services in yellow to alert the technician and doctor. When services are delivered tomorrow, the technician or doctor can highlight in pink or circle the code so the receptionist knows to enter those charges when checking out the client.

Receptionists also can insert specific brochures in records such as a senior pet questionnaire for every patient age 7 and older. When technicians and doctors see materials

already in records, they know to explain information to clients. Pre-screening records for compliance gaps and pre-stuffing handouts will give you an organized list of medical priorities for every patient you see.

**2. Echo your protocol for prevention.** Consumer research shows people need to hear a message three times before taking action. To apply this theory to heartworm prevention, here is each team member's role:

The receptionist asks the client upon check-in, "Do you need any heartworm preventative refills while you're here today?" She then alerts a veterinary assistant who can fill the medication and have it waiting at the front desk when the client is ready to pay. In addition to reducing waiting time at checkout, you'll increase compliance and sales for preventatives. Always put a prescription label on every preventative you sell. This tells the client which pet the medication belongs to and when and how to give it properly. Prescription labels are especially important in multi-pet households and for drugs that could be harmful if given to cats.



When starting the appointment in the exam room, the technician asks the client, "What preventatives do you give your pet, and what day of the month do you give them?" The client should name specific brands and an exact day of the month they're administered. If not, you instantly know the pet isn't consistently protected. Use an exam questionnaire like the one in my book, *The Veterinary Practice Management Resource Book & CD*. For an order form, visit [www.csvets.com](http://www.csvets.com) or call 720-344-2347.

Technicians use this questionnaire to consistently educate clients about wellness areas and monitor compliance.

The veterinarian should confidently communicate what medical services are necessary such as "We need to do a heartworm test today" instead of the weaker approach of "Do you want a heartworm test today?" If the client is worried about the price, you'll quickly see it in her body language or she'll ask. Then explain the cost and importance of the test. Set a protocol that pets must have a current heartworm test within 12 months in order to get a prescription refill for heartworm preventatives. This guideline is supported by the American Heartworm Society ([www.heartwormsociety.org](http://www.heartwormsociety.org)) and Companion Animal Parasite Council ([www.capcvet.org](http://www.capcvet.org)).

This 1-2-3 approach by a receptionist, technician and doctor clearly communicates your hospital's emphasis on preventing heartworm disease, fleas and ticks year-round in dogs and cats.

**3. Send clients home with more than an invoice.** If you recommend a new product such as a therapeutic diet or arthritis medication, provide a brochure. When prescribing a NSAID for a dog's arthritis, give the client the brochure, "Prescription Medications: Testing helps us choose the right medication—monitoring helps ensure lasting effectiveness," from IDEXX Laboratories. Explain why you need to conduct blood tests prior to drug administration as well as the intervals of routine retesting.

Add wall-mounted brochure racks to exam rooms and the reception area. When you store brochures within arm's reach, you'll educate more clients. Wall-mounted acrylic racks are available from office supply stores. Label each slot, and stock the same brochures in the same order in every rack. Every exam room should have communication tools you routinely use. If you're in exam room #1 with a client and need a brochure on intestinal parasites, you won't go fetch it out of room #3. Appoint a staff member as the "handout caretaker" who is responsible for stocking and ordering exam report cards, brochures and home-care instructions.



**4. Use visual aids to increase client understanding.** Rather than fill exam rooms with pretty artwork, hang framed educational posters. Remember, the exam room is your classroom. Pretend you're a teacher who's getting her classroom ready for the first day of school. What do your students need to learn? In addition to posters, consider a bulletin board that features topics you can rotate monthly. Vendors can provide models, anatomical drawings and brochures. If you have three exam rooms, you need three models.

**5. Give clients a choice between two "YES" options.** Always offer clients a 12-month supply of preventatives first. If they cannot afford 12 months today, go to a six-month supply. This helps ensure that the pet is on year-round protection. Only offer a single dose as a last resort or if it is a puppy whose weight will change and need a different dose. For example, "We offer \_\_\_\_\_, a monthly preventative that's given year-round to protect your pet from heartworms and intestinal parasites. Would you prefer a 12-month or 6-month supply today?" Or when recommending a therapeutic diet, ask the client, "Would you prefer a 4 or 10 pound bag of food today?" The question is repositioned as "which do you want?" rather than "do you want it?"

**6. Send e-mail reminders on the day of the month that pets need preventatives.** This is easier than it sounds, even for the technology challenged. All heartworm and flea and tick manufacturers offer this free service through their websites. At checkout, tell the client, “Susan, here is Sophie’s monthly heartworm preventative refill. It’s important that she takes it on the same day each month and is protected from heartworm disease year-round. Would you like us to sign you up for a monthly e-mail reminder on the day of the month that Sophie needs to take her heartworm preventative?”

Don’t just tell the client the website where they can sign up for monthly e-mail reminders because few will do it. Instead, collect the client’s e-mail address and then go online to enter her information. Manufacturers guarantee the client’s e-mail will only be used for that purpose, protecting the confidential doctor-client communication. Here are websites to bookmark on your computer for heartworm and flea and tick manufacturers:

- Revolution offers a voice messaging call that states your clinic name and the pet’s name at 1-888-REVOLUTION or e-mail reminders at [www.revolution4cats.com](http://www.revolution4cats.com) or [www.revolution4dogs.com](http://www.revolution4dogs.com).
- Heartgard has e-mail reminders at [www.heartgard.com](http://www.heartgard.com).
- For Frontline reminders, go to [http://us.merial.com/pet\\_owners/reminder\\_services/index.asp](http://us.merial.com/pet_owners/reminder_services/index.asp).
- For e-mail reminders for Interceptor and Sentinel, visit [www.remindmypet.com](http://www.remindmypet.com).
- Iverhart offers e-mail reminders at [www.iverhart.com/Monthly-Reminders/](http://www.iverhart.com/Monthly-Reminders/).
- Tri-Heart Plus provides a compliance clock refrigerator magnet and e-mail reminders at [www.triheartplus.com/viewNewCustomer.do](http://www.triheartplus.com/viewNewCustomer.do).
- For Advantage reminders, go to [www.nofleas.com/My-Pet-Health-Journal.asp?oppr=add](http://www.nofleas.com/My-Pet-Health-Journal.asp?oppr=add).

**7. Create a “recommended services” callback in your veterinary software.** Once a recommendation is made, take action to make sure the pet gets the recommended product or service. When the doctor recommends a dental cleaning for a pet in the exam room and the client does not schedule the procedure at checkout, have the receptionist enter a one-week callback. Add a section to your travel sheet of common recommendations that need follow up, such as “dental recommended,” “weight loss recommended,” “senior screen recommended,” etc.

A technician or receptionist can call the client and say, “The doctor asked me to call you about scheduling Ollie’s dental cleaning so we can treat and slow the progression of his dental disease. When would be a convenient time for you to schedule Ollie’s dental cleaning? We have an opening on Friday or Monday, which best fits your schedule?” Always direct the client to a possible appointment time because you’ll increase the likelihood she will say yes.

When you educate clients with confidence and take command of compliance in your practice, your patients will be the beneficiaries. Discuss these ideas at your next staff meeting and decide which ones will work best in your practice.

### **About the Author:**



Wendy S. Myers owns Communication Solutions for Veterinarians in Denver. Her consulting firm helps teams improve compliance, client service and practice management. Communication Solutions for Veterinarians has provided mystery phone shopper training to more than 2,600 receptionists nationwide. Wendy is a partner in Animal Hospital Specialty Center, a 13-doctor AAHA-accredited referral practice offering internal medicine, surgery, neurology, oncology, specialty dentistry, and emergency care in Highlands Ranch, Colorado. She is the author of four books and five videos. Subscribe to Communication Solutions for Veterinarians’ e-newsletter on our website at: [www.csvets.com](http://www.csvets.com). E-mail Wendy at: [wmyers@csvets.com](mailto:wmyers@csvets.com).