

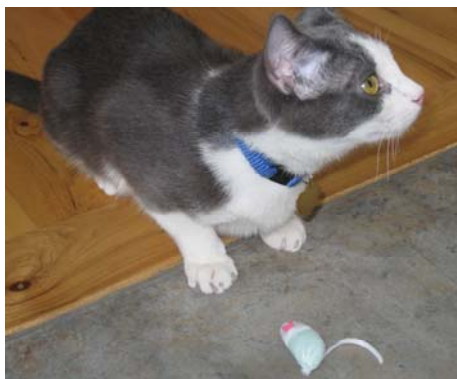
## How to Improve Compliance for Medical Progress Exams

*Missed opportunities can put patient care and practice income at risk*

By Wendy S. Myers

At a bustling Las Vegas hospital, one in five puppies must restart their vaccine series because clients miss the window for when the next doses are due. Rather than returning three weeks later, clients often forgot to call to schedule appointments or returned months later after receiving overdue reminder postcards.

Missed opportunities for medical progress exams and professional services affect every practice. Research from Veterinary Metrics in Atlanta found a two-doctor practice typically misses 300 to 600 follow-up visits annually. In today's economy, you don't want to gamble patients' health or risk practice income. Here are four common missed opportunities and actions you can take now:



**Puppy and kitten vaccination series:** Compliance is highest at checkout, so receptionists should tell clients, "Your puppy will need his next vaccines, deworming, and intestinal parasite test in three weeks. That would be (date). Does this same time work for you?" Suggesting a specific date for the follow-up visit will encourage the client to book the appointment today. Then give the client an appointment reminder card with the date, time, and doctor's name.

Scheduling the next puppy and kitten visit at checkout allows the client to see the same veterinarian, saving time on repeating history or duplicating educational topics that another doctor and technician covered during the previous visit.

If the client doesn't schedule the next pediatric visit at checkout, enter a callback in your veterinary software. Call the client one week before the next services are due so she has time to fit the appointment into her schedule.

**Ears, skin, and chronic conditions:** Let's say you diagnose a dog's ear infection today and send the client home with ear medication and cleaner with instructions to treat the infection for 10-14 days. You'd like to see the patient at the end of treatment. Most clients will follow your

instructions for the first three days. Then the dog quits shaking his head so the client stops treatment. The ear infection returns, now worse, a few weeks later. The client blames you or claims the “medication didn’t work.”



To improve compliance for chronic conditions, hang wall calendars in exam rooms or open the appointment schedule on computers in exam rooms. Tell the client the specific date when follow-up care is needed. Use a benefit statement to emphasize the importance of returning. Rather than telling the client, “I’d like to recheck your dog’s ears in two weeks,” the doctor should say, “I will see your dog again on (date). Ear infections can be painful and develop into a serious condition unless treated and rechecked to make sure the infection has cleared. The receptionist will schedule an appointment for you and Jake for his medical progress exam on (date).” Without identifying a specific date for the follow-up exam, the client may misinterpret the doctor’s advice and hear, “If the ears don’t get better, come back.”

To ensure that patients return for medical progress exams, use a travel sheet with a checklist for medical progress exams. My book, *The Veterinary Practice Management Resource Book & CD* (720-344-2347, www.csvets.com), includes outpatient travel sheets with common intervals for doctors to check so receptionists know to schedule follow-up visits at checkout. Add a section to your travel sheet such as:

When do we need to see this patient next?

- 3-5 days
- 7 days
- 10-14 days
- Other \_\_\_\_\_
- Regular reminder cycle

In addition, enter a medical callback at Day 3 and Day 10. A technician calls the client to ensure treatment continues. Besides checking on how the pet is feeling, the staff member can schedule the medical progress exam if an appointment was not made at checkout. These

medical callbacks at Day 3 and Day 10 show value for your professional services and increase client satisfaction.



**Professional dental cleanings:** Include a medical progress exam with every professional dental cleaning. This follow-up appointment occurs one to two weeks after the outpatient service. For a Grade 3 dental cleaning with extractions, you can check the incisions for proper healing. If you apply a sealant such as OraVet at the time of the cleaning, the first home-care application would be due at the same time as the medical progress

exam. Apply another dose of OraVet during the follow-up visit, and send the client home with the rest of the home-care kit.

Teaching brushing and other dental home-care options during the medical progress exam is better timing because the patient's mouth has healed from the professional cleaning. The client also is more committed to home care after understanding the health benefits of professional care. Bundle this medical progress exam in your dental group code. A veterinarian or technician can see the patient for the follow-up visit, depending upon your practice's protocols.

**Medication monitoring:** A client calls to refill her dog's prescription for Previcox a few minutes before closing time. After placing the caller on hold to pull the patient's medical record, the receptionist discovers a blood test is due. Instead of catching diagnostics upon refill requests, take a proactive approach.

Enter the number of refills. When filling the first prescription, the technician notes the number of refills available in the computer and medical record. For example, if a doctor wants a blood test every six months and the technician is filling a one-month supply, five refills of 30 tablets are available. The number of refills also prints on each prescription label.

When the client calls for a refill, the receptionist can access the client's record on the computer and instantly see if the medication can be refilled without having to ask a doctor or pull a medical record. This is a significant time saver and provides timely answers for clients.

Send reminders for testing. When the initial prescription for a long-term drug is filled, enter a reminder in your veterinary software for the follow-up blood test. Create a computer code such

as “Arthritis Medication Monitoring Blood Test” that has a six-month reminder. This code is entered in addition to the prescription.

In six months, this code will trigger a reminder such as: (Pet name) has been previously diagnosed with a medical condition that requires monitoring. Maintaining your pet’s health is important to us. (Pet name) is due for a blood test for drug monitoring, which is required for future prescription refills. Please call us at 555-555-5555 for an appointment.

Create medication monitoring codes such as:

- Arthritis medication monitoring
- Heart medication monitoring
- Seizure medication monitoring
- Thyroid medication monitoring
- Urethral incontinence medication monitoring
- Allergy medication monitoring



Use stickers when testing is coming due. When blood work will be due before the next refill, put a colored label on the prescription vial such as “Blood test required before next refill.” The prescription label also will note that zero refills remain.

Because most clients buy a month’s supply, for 30 days she will see the fluorescent label that testing is due before the next refill. These techniques will prevent last-minute requests because most clients don’t call for refills until the last dose is gone.

**A final word of advice:** Use the term “medical progress exam” instead of “recheck.” From a client’s perspective, “recheck” sounds free and optional. Upgrade your terminology to “medical progress exam” to show value for your professional services and the necessary follow-up care for the patient. The fee for a medical progress exam is typically 75 percent of your exam fee. For example, if you charge \$45 for an exam, a medical progress exam would be \$33.75.

When you schedule medical progress exams at checkout and add reminders and callbacks, you’ll capture more of the missed opportunities in your practice. Besides improving patient care, you’ll have a healthier bottom line.

### **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).