

Use a Checklist to Be a Compliance Superhero

By Wendy S. Myers



When paws pitter-patter through your clinic door, you need to be super heroes for compliance. Time is of the essence. A 20-minute annual exam leaves precious time to educate clients. Receptionists are the first line of defense against compliance villains that rob patients of optimal wellness. Use a compliance checklist to prepare charts (see page 4). Check “yes” if the patient is following your standards of care or “no” if the pet is out of compliance.

Clip the completed compliance checklist to the front of the medical record. Paperless practices can link the Word document to the patient’s computer record. For an electronic copy of the compliance checklist, e-mail wmyers@csvets.com and put

“Compliance checklist” in your subject line.

Before technicians and doctors enter exam rooms, they can identify compliance villains lurking behind wagging tails. Here are widespread compliance scoundrels to look for:

Compliance villain: Missing intestinal parasite test. A Merial study found 83% of dog owners are unaware their pets’ waste can cause parasite infections in humans. The Centers for Disease Control and Prevention found almost 14% of the U.S. population is infected with roundworms. Dog ownership was associated with infection. Parasite protection is equally important for indoor cats because 15% of potting soil contains roundworms.¹

Be a compliance super hero: Like Batman’s bat-signal, appointment confirmation calls light the path to compliance. Have receptionists call one or two days before appointments and say, “This is Wendy calling from Your Veterinary Hospital to confirm Mason’s appointment with Dr. Myers tomorrow at 10 am. Please remember to bring a teaspoon-sized stool sample that’s fresh within four hours, as well as any medications and supplements you’re currently giving Mason. If you have questions or need to reschedule, please call us at 555-555-5555.”

If clients forget stool samples, the technician says, “I’m taking Mason to the treatment area where we’ll collect a stool sample for his intestinal parasite test. We will screen for multiple intestinal parasites, including those that can be passed from pets to people.” If you’re unable to collect samples, say, “We were unable to collect a sample from Mason so I’m sending you

home with this prepaid collection cup. Just drop off his stool sample in the cup at your convenience and we'll call you test results. We'll also call you as a courtesy reminder if you haven't dropped off his sample within seven days." Enter a callback for one week later in case the client forgets to return the collection cup.

Compliance villain: Short doses of preventatives. A Merial study found 64% of dog owners leave veterinary hospitals without heartworm prevention. When screening records, look for the last date of flea, tick and heartworm preventative purchase, products sold, and number of doses sold. Let's say a client with two Jack Russell terriers visited last year and bought a 12 pack of heartworm preventatives and three pack of flea control. Each dog got six doses of heartworm preventatives and just one of flea control.

Be a compliance super hero: When taking a history, technicians should ask clients, "What heartworm preventative and flea control do you use? What day of the month do you give it?" If clients don't instantly respond, the technician revisits the importance of monthly dosing.

To encourage year-round compliance, the technician can confirm the reason for today's visit and state the services that will be performed. "Debbie, you're here for Mason's wellness exam, vaccines, heartworm and intestinal parasite tests, and we'll also refill 12 months of his heartworm preventatives and flea control. Is there anything else you want to be sure to discuss with the doctor today?"



Compliance villain: Other pets in the family that are overdue for services. Cat Woman may be hiding in the shadows. When reviewing Mason's record, you notice Debbie has an indoor cat named Snickers that you've not seen in three years.

Be a compliance super hero: When the veterinarian is finished with Mason, simply ask about the indoor cat. "How is Snickers doing? Did you know it's been three years since we've seen her? Even though Snickers is indoors, she still needs an annual exam, vaccines, diagnostic tests, and preventatives to make sure she stays healthy. I could see her tomorrow afternoon, and we could get Snickers caught up in just one visit." The receptionist can schedule Snicker's appointment when checking out Mason.

Like the Fantastic Four, veterinarians, technicians, receptionists, and practice managers can become unbeatable compliance super heroes. As a result, patients get better care, clients save money because pets stay healthy, and practice profits are protected. Look for compliance villains loitering in your patients' records and you'll save the day!

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. E-mail Wendy at: wmyers@csvets.com.

¹ "Toxocara: Not to Be Underestimated," *The Veterinary Record*, February 18, 2006, page 217.



Compliance Checklist

Check YES if the patient is in compliance with your protocols. Check NO if the patient is not in compliance.

Client name _____ Patient name _____
Date _____ Reason for visit _____

Wellness exam

Yes No
 Current

Vaccinations

Yes No
 Core _____
 Non-core _____

Parasite testing and preventatives

Yes No
 Intestinal parasite test
 Heartworm test
 Flea/tick control Brand _____ Quantity ____ Date of last purchase _____
 Heartworm preventative Brand _____ Quantity ____ Date of last purchase _____

Dental care

Yes No
 Recommendation for professional dental cleaning
 Dental home care Products _____

Nutrition

Yes No
 Appropriate weight for age and breed
 Weight-loss program recommended
 Current on therapeutic diet

Wellness diagnostics

Yes No
 Wellness blood work
 Senior screen

Chronic medications

Yes No
 Current on refills
 Current on drug monitoring test

Microchip

Yes No
 Chip implanted
 Scanned, confirm that client has current contact info on file with microchip company