

# Wellness: Protocols and Pre-Exam Prep

## A Commitment To Compliance Article



A campaign sponsored through the cooperative efforts of Merial, MWI and AAHA MARKETLink.

“In the 2009 AAHA study, one tool emerged as among the most important aids to practices with successful compliance-improvement programs. The tool? A compliance checklist ... To make the best use of the checklist, put it to work before the client arrives.”

The truth is that even high-touch, bond-focused practices with longer-than-average appointment slots have a finite amount of time to spend with each patient. Whether you have a large client services team or a spare staffing model, making the most of the time you do have while clients are onsite requires:

1. Wellness and other pet care protocols
2. Staff education in both the protocols and client communication
3. Tools and systems to track what is due and what isn't
4. Sustained wellness efforts that last throughout each pet's life, not just a few weeks or months here and there

In other words, much of your success in any exam depends on the work you do beforehand.

### Protocols With a Patient-Specific Twist

While pet care protocols ensure the best possible care for all patients, clients focus only on the ones that apply in their household. So, while you're targeting core wellness and compliance elements, be sure to leave room in your planning and communication for each pet's unique situation.

Your practice protocols likely address these and other key elements:

- Regular exams (frequency based on a pet's current age and health status)
- Vaccinations or titer testing (based on established guidelines)
- Parasite testing and prevention
- Dental grades and cleanings
- Screening blood work
- Nutrition (regular or prescription)
- Pet ID and microchip (including registration)
- Ongoing medication



That's the agenda when you begin each day or walk into the exam room. Clients probably have their own concerns when they visit, so it's important to balance what you want to communicate with what the client wants or needs to tell you.

## Ongoing Training

Regularly revisiting pet care protocols and client communication strategies produces several valuable results:

- Deeper understanding of why protocols matter to lifelong wellness
- Renewed commitment to quality pet care
- Clarity on situations where practice protocols may not apply

United, consistent conversations from everyone in the practice increase the number of "exposures" clients have to pet care messages. This is especially important if you've changed your protocols or upgraded the kinds of recommendations you make. Even a year or two after such a switch, clients might be confused—"You suggest X? I thought you recommended Y?"

While it seems like old hat to you because you talk about it all day, clients may not have heard about any protocol upgrades more than a few times.

Confusion or contention might also arise if a particular protocol element does not apply to a particular pet based on the client's wishes or the pet's health status. For example, maybe this one client follows a limited vaccination schedule or this one cat with bad teeth is a big anesthetic risk because of recently diagnosed congestive heart failure. If staff continues to press the client, that client might feel that the "rule" trumps the pet's specific issues or, much worse, that the veterinary team doesn't understand or remember the details of this particular case.

Protocols set the standard of care. Your patient knowledge and client communication skills provide the art, or at least artfulness, of the practical application of veterinary medicine.

## Protocol Reminder Gone Wrong

Kim Campbell Thornton ranks in the top 1% of pet owners in terms of knowledge, commitment, and passion. A breed enthusiast (she lives with three Cavalier King Charles Spaniels), Thornton's professional publishing credits stretch across the veterinary and pet markets:

- Writer for "Your Dog" from the Cummings School of Veterinary Medicine at Tufts University
- Creature Comforts columnist for MSNBC.com
- Contributing writer/blogger for PetConnection.com (veterinarian Marty Becker's site)
- Author of several dog books, including *The Everything Dog Health Book*

Her partnership with a veterinary hospital goes back 20 years. Even so, after a new staff member botched intake questions and protocol-based reminders when she arrived with two of her dogs for exams, Thornton walked out.

The problem has since been resolved thanks to calls to and from a veteran receptionist, one of the practice partners, and the practice manager, but Thornton went home that day and posted "The Walk-Out: Veterinary Staff Make or Break a Visit" on the PetConnection.com blog.

What went wrong? A new staff member told Thornton her dogs were not due for exams and suggested that she could see a technician instead of seeing a veterinarian.

In fact, her two dogs were at least a few months overdue for wellness exams, and Thornton had questions about itchy skin and nighttime panting, flea control other than spot-ons, and the costs of OFA hip X-rays. Her eldest dog also needed a geriatric blood panel drawn. But, she didn't get the chance to mention any of that because the staff member focused on only a handful of items that came up in the system as reminders, including vaccines or titer tests.

When Thornton disagreed that any vaccinations were due, the staff member replied, "Do you have proof of that? Because we can't just take your word that they don't need vaccinations. If you had the vaccinations done elsewhere, we need to see those records."

Asked to describe her feelings in the moment, Thornton says, "I would say I was more perturbed at being asked if a tech check was okay rather than a vet visit. If it had been, that's what I would have scheduled. Maybe the vet was running late or maybe the receptionist was trying to be helpful and save me some money, but whatever the case, it just didn't come off very well. Then, the whole vaccination discussion started."

In addition to an apology from the new staff member for fumbling their conversation, the practice team added a pop-up note in her dogs' medical files, explaining her limited vaccination protocol to prevent future misunderstandings with this loyal, longtime client.

"None of the old-timers would ever have questioned/challenged me like that," Thornton says. "It was just unfortunate that everyone up front that day and time (noon) was new."



## Take the Challenge

1. Develop and implement the use of a compliance checklist that tracks key elements in your practice protocols.
2. Measure how the use of this simple tool improves compliance and consistency by tracking your data before its implementation and afterwards.
3. Schedule a compliance sustainability meeting and ask teammates to brainstorm games, tracking ideas, and other ways to keep everyone's morale and momentum going week to week, month to month, year to year.
4. Role-play scenarios where protocols do not apply.

### Compliance Tools

The 2009 AAHA compliance study showed the value of using a compliance checklist to pre-screen all patient charts a day or so before appointments. Researchers called it “among the most important aids” to improved client compliance.

What the checklist does is provide a *systematic* way to review charts and other client communication records to refresh the team's collective memory about what's going on with this specific pet and what needs to be done. Such tools, used consistently, create good wellness-focused habits in the entire practice team.

Typically, in advance of any appointments, a technician or client services specialist:

- Reviews the next day's charts
- Completes the compliance checklist (noting what is due at this visit or what recommendations need to be reminded/revisited)
- Attaches the checklist to the chart so that everyone who has contact with the patient/client has a quick overview of the case

Even when the workday gets hectic or the emergency calls ring nonstop, these brief reminders make sure everyone is on the same page for this patient's visit on this particular day. It's entirely possible that something has changed with the case since the last time you personally handled the pet. Or, perhaps this longtime client has specific plans for her pet's care. Either way, having these reminders in the moment can really help with both client communication and a broader sense of consistency.

Therefore, the checklist allows each person in the chain of contact to take part:

- Client services staff reviews the list of due items and asks the client to confirm and/or add any important needs for the exam.
- Technicians review recommended care, answer clients questions, and begin any hands-on work required, such as blood draws.
- Veterinarians revisit any outstanding protocols, address the client's additional concerns for the day, and provide additional educational materials on topics discussed.
- Client services staff reviews new recommendations and schedules necessary appointments or sets reminders and follow-ups in the system.

According to the 2009 AAHA study, “The use of a checklist, along with appropriate actions by each member of the practice team, can return huge dividends in compliance improvement.”

### Sustain the Effort

Wellness efforts that span every patient and every appointment for years to come require:

- Ongoing and frequent staff training, as we've already discussed
- Monitoring and reporting of compliance results
- Continuing commitment of practice leadership

While each individual practice team member cannot control all these requirements, each person can take responsibility for his or her own enthusiasm and efforts to improve patient wellness.

So, what keeps you motivated? How can you track your support of practice-wide wellness protocols?

Maybe a personal tally sheet with simple tic marks for every chart you check for compliance status or recommendation you make is enough.

Maybe you need a more graphic visual such as dropping marbles or candy into a jar every time you or a team member makes at least one recommendation during an exam.

Maybe daily, weekly, or monthly contests (with fun prizes) will keep you sharp.

Whatever it is for you or your teammates, now is the perfect time to figure out ways to keep everyone motivated and focused on lifelong wellness for all pets in your practice. That is, after all, the real purpose of any compliance-improvement program.

#### References

<sup>1</sup>Six Steps to Higher-Quality Patient Care (AAHA, 2009), page 13.

<sup>2</sup>Six Steps to Higher-Quality Patient Care (AAHA, 2009), page 16.

<sup>3</sup>Six Steps to Higher-Quality Patient Care (AAHA, 2009), page 27.



# The Role of Retailing in Compliance: Compliance Resources from AAHA MARKETLink

AAHA  
**MARKET**  
Link.



From Happy Birthday Postcards to on-hold scripts, newsletter inserts and questionnaires, there are many ways to prepare your clients for what to expect from, and be on the lookout for, in their aging pet. Download these information tools from [www.AAHAMARKETLink.com](http://www.AAHAMARKETLink.com) or adapt to fit your own needs.

# The Role of Retailing in Compliance: Compliance Resources from AAHA

AAHA  
The Standard of  
Veterinary Excellence

## Connecting with Clients: *Practical Communication for 10 Common Situations*, Second Edition

Communication is the cornerstone of any healthy relationship, including those you build with your clients. But do you and your staff really know how to communicate well in difficult situations?

This product gives every member of the veterinary team insightful, easy-to-understand information about what to say and what to do in a variety of challenging client-relations situations, including dealing with financial constraints and indecisive clients.

Authors Dana Durrance, MA, and Laurel Lagoni, MS, provide a situation summary and assessment for each of the ten circumstances covered, as well as role play exercise ideas. Designed to be used as both a quick reference guide and team training tool, this indispensable book includes:

### Interactive online video component!

- An overview of communications skills
- A glossary of communication terms
- Advice for developing your own protocols
- An additional resources section
- A role-play feedback form



Using the training methods featured in *Connecting with Clients* will lead to better communication, result in trust-based relationships, and create a better client experience.

Members: \$39.95

Nonmembers: \$49.45

## Educating Your Clients from A to Z: What to Say and How to Say It

Empower your staff to expertly answer clients' questions with this guide. Using 16 proven principles of communication as a foundation, this book covers 26 topics that will educate your employees, from A (appointments) to Z (zoonotic diseases). Entertaining, well organized and easy to read, it is a perfect training tool for receptionists, assistants and technicians. The information can easily be adapted and used by any practice on a daily basis.



Members: \$39.95

Nonmembers: \$49.95

## How We Do Things Here: Developing and Teaching Office-Wide Protocols - CD-ROM with guide

Train your entire staff together on issues that affect everyone with this resource from AAHA Press. Most practice managers train individual staff members on their duties as they are hired, but often don't address issues that affect the whole staff, stopping short of complete training.

These easy-to-implement weekly, biweekly or monthly staff training meeting guides teach all new staff members office-wide protocols so everyone, from the receptionist to the veterinary technicians, know, for example, how much the practice charges for x-rays and why. This CD-ROM and manual can be modified to fit existing protocols or can be used to develop new ones.

Members: \$69.95

Nonmembers: \$84.95



## Preferred Medical Protocols

Developing preferred protocols for a practice is valuable, both for increasing communication between staff members and for introducing new staff to the practice culture. With an emphasis on quality medicine, Preferred Medical Protocols can be a tremendous aid in formulating standardized diagnostic and therapeutic protocols for the more common conditions seen in small animal veterinary practices. This book gives all team members in the practice a basic understanding of how each case is being handled and helps ensure that care is always at the highest level.

### New to this edition:

- Complete cardiac formulary
- Current management of hyperadrenocorticism
- New drugs for use in clinical practice
- Current recommendation for management of hypertension
- Management of urinary bladder tumors
- Overall update of clinical management

Members: \$134

Nonmembers: \$149



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## Ask Your PMS Vendor to Incorporate the New AAHA Standardized Diagnostic Terms

The AAHA Diagnostic Terms Review Board has finished mapping the AAHA Diagnostic Terms to the Systematized Nomenclature of Medicine — Clinical Terms (SNOMED-CT) and is releasing the terms under reciprocal open-source licenses, without fee or royalty. The Diagnostic Terms are available online as an open source license.

We are finding that many members are not able to use the terms due to incompatibility with their PMS systems. AAHA encourages you to contact your PMS vendor to express your desire to have these standardized diagnostic terms incorporated into your software.

The AAHA Diagnostic Terms were created in recognition of the need to exchange clinical information consistently between different health care providers, care settings, researchers and others.

“With creating and utilizing common veterinary medical terminology, we will be able to collect clinical medicine metrics from which we will gain increased knowledge of disease prevalence,” said Michael Cavanaugh, DVM, DABVP, AAHA Executive Director. “These codes will also allow a means of measuring quality of clinical care which helps the veterinary industry, veterinary practitioners, pet owners and pets.”

Although single practices can develop their own diagnostic codes, problems arise when veterinarians attempt to combine or compare data with other hospitals. The advantages of standardization are apparent when analyzing the large sets of data that are utilized in epidemiological studies, evidence-based medicine, and pharmaceutical research and development.

To access the AAHA Diagnostic Terms, users must apply for a free Unified Medical Language System (UMLS) number from the National Institute of Medicine or an International Affiliate Number. Having a license number to use the terms is necessary because the terms are mapped to SNOMED-CT codes. Links to apply for a UMLS number, review the AAHA License Agreement, and view the AAHA Diagnostic Terms can be found online at [www.aahanet.org](http://www.aahanet.org), under the “Resources” tab.

## AAHA Launches Campaign to Relocating Pet Owners

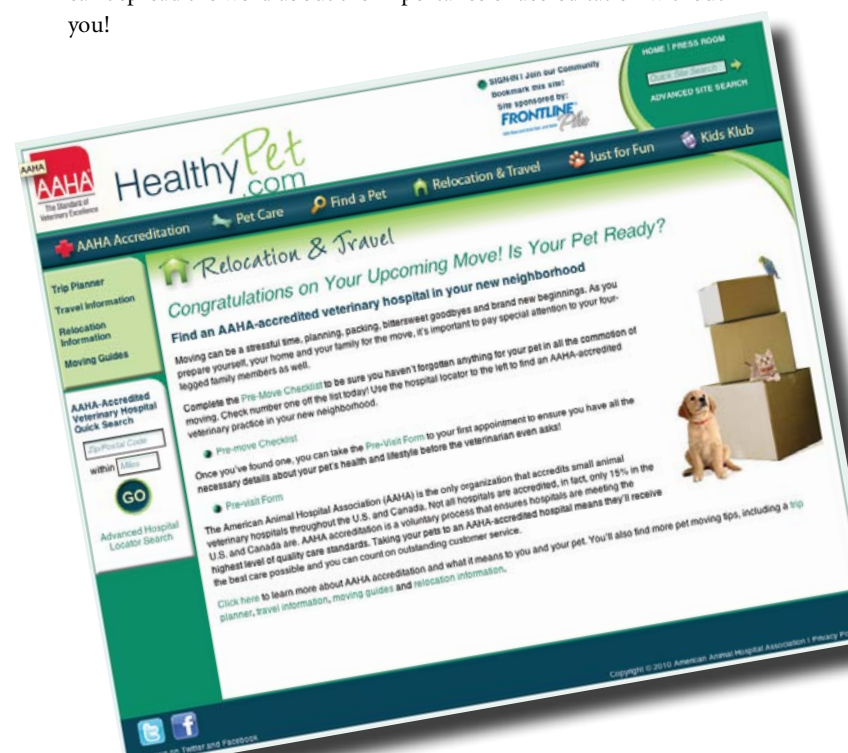
AAHA is embarking upon the next phase in our Accreditation Awareness Campaign, reaching out to a prime target audience of pet owners – those relocating. We need your help and want to reward practices that track their new clients based on this campaign with monthly drawings for staff pizza parties.

We discovered in our pre-campaign research that pet owners who are moving would be one of the most likely audiences to switch or begin using an accredited veterinarian. For this reason, in August, we launched a test campaign in the northeastern United States to hit pet owners as they prepare for their move and once again when they arrive at their new location. This campaign will drive pet owners to *HealthyPet.com* and focus on finding an accredited veterinarian in their new neighborhood as a primary message.

This movers’ campaign is a large investment that requires thorough testing before spreading it across the AAHA membership area. Your participation in this test is absolutely crucial for us to obtain valid results. If the test doesn’t succeed, the Association will not proceed with a wider market in the future. Whether or not the test market includes your region, there is always a possibility that a relocating pet owner could find your practice as a result of this campaign, and we want to prepare you for that.

Accreditation Advocates in the target area should have received more information via email, including a link to the tracking form we’re asking you to submit to be eligible for a team pizza party each month. You can check the *brandBUZZ* Campaign Chatter for that information as well. Visit [www.aahanet.org](http://www.aahanet.org) and click on the “Read brandBUZZ” quick link on the left.

We sincerely thank you for your cooperation on this test campaign and dedication to veterinary medicine. As we’ve said all along, this Accreditation Awareness Campaign depends on members like you. We can’t spread the word about the importance of accreditation without you!



## Registration for the AAHA/ OVMA – Toronto 2011 Conference Is Open



The American Animal Hospital Association (AAHA) and the Ontario Veterinary Medical Association (OVMA) are teaming up in Toronto, Canada to bring you the AAHA/OVMA Conference – Toronto 2011, March 24-27.

When AAHA and OVMA collaborate, you not only receive the service and quality that both conferences are known for, but you become part of the largest annual veterinary gathering in Canada as well. Toronto is one of the most cosmopolitan cities in the world: a place where international ideas blend with Canadian culture.

As an AAHA/OVMA Conference attendee, you have the unique opportunity to obtain top-notch CE in a place that fuses the traditions, passions and perspectives of the more than 100 cultures found in Toronto. This makes for a unique and unprecedented opportunity for networking across the borders. AAHA and OVMA have recruited top speakers to discuss the hottest issues facing the veterinary industry and offer these sessions in a personal environment, many of which encourage interaction.

**Hot topics like these are presented in a new light when you have access to expert speakers with blended backgrounds:**

- Behavior
- Emergency & critical care
- Neurology
- Clinical pathology
- Compassion fatigue
- Communications
- Mentoring and teamwork

Register at [www.aahanet.org/AAHAOVMAToronto2011](http://www.aahanet.org/AAHAOVMAToronto2011) or by calling 800/883-6301.

## Speak to More than 1 Million Pet Owners Through AAHA's *PetsMatter*

Write for the bi-monthly publication and get your name in print with features that consumers can relate to.

Submit article abstracts to [petsmatter@aahanet.org](mailto:petsmatter@aahanet.org) or call 720/963-4477 for more information.



# Commitment To Compliance



## Resources at your fingertips!

Did you know that every month AAHA MARKETLink adds resources to the web for you to use in your practice, with just a click of the mouse? You can get everything from articles, postcards, newsletter inserts and suggested on-hold scripts. We invite you to join us as we drive the concept of increasing compliance into action with our Commitment to Compliance Tools. Check out AAHAMARKEKLink.com and download your compliance resource tools today!

AAHAMARKETLink.com and now also at [aahanet.org/AAHAMARKETLink](http://aahanet.org/AAHAMARKETLink)

**[AAHAMARKETLink.com](http://AAHAMARKETLink.com)**