

## Taking the Paperless Plunge

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Jessica Goodman Lee, CVPM

A few months ago I was invited to consult at a veterinary practice where the owners' greatest concerns were both client and receptionist retention. They had a new state-of-the-art facility with all of the bells and whistles and no problem attracting new clients. When they studied their numbers, though, they realized that a large number of these new clients were requesting to have their records transferred after their first or second visit. As for the staff, when they were asked why they were leaving during their exit interview, the most common answer was, "it's just too stressful here."

When I visited the practice I spent much of my time just watching, listening and following individual appointments as they proceeded through the hospital. While it didn't take a genius to figure out that there were major problems with efficiency, appointment flow and client service, what I realized was that there was actually a single solution I could offer that would improve all three at the same time. It wasn't an easy fix, but they didn't have much of a choice if they wanted to tackle the problems they were facing.

On the last day of my visit we had a staff meeting, and I could see that everyone was eagerly waiting for me to tell them how to "fix" their problem. I explained that this was an unrealistic expectation, but that I did have some ideas we could talk about. First, though, I asked them to humor me, and participate in a quick exercise by closing their eyes and visualizing the following scenario:

*Imagine that you are the owner or manager of the practice and you walk in on a Monday morning. As you scan the lobby all of the receptionists are up front helping clients and they smile and wave as you walk in. The phones are ringing and there are clients in the lobby, but there is no sense of chaos as they multi-task and answer client questions without ever leaving the front desk. You hear an appointment being scheduled over the phone and you are amazed at how quickly the call is completed.*

*Just as you reach your own desk the receptionist pages to tell you Ms. Jones is on line one and has asked to speak to you about her dog Buffy. Although you have no clue who Ms. Jones is, or what she wants to discuss, you quickly turn on your computer and scan the medical notes and recent lab results, as well as the notes the technician had made after a phone call the day before. No more than two minutes have passed as you pick up the phone and greet Ms. Jones, and three minutes later you are able to hang up having handled her question and thoroughly impressed her with your familiarity of Buffy's medical history. One minute later you have completed your notes regarding the call and are off to tackle the rest of the day!*

When we were done I asked them to open their eyes and tell me whether that sounded like A) a typical day for them or B) like they had gone to heaven. Heaven won hands down.

The next question I asked was, “*what’s missing from this scenario?*” One staff member’s hand shot up, “it sounds to me like all the information was in the computer!” Yes, this was exactly what I was getting at (although in a somewhat convoluted, round-about way). As an aside, it was interesting to see the immediate reactions within the group; while most of the staff started talking excitedly amongst themselves about the idea, several of the doctors seemed completely panic stricken. In fact one of the veterinarians exclaimed, “There is no way I can walk into an exam room without a chart; I’d feel naked!”

The intent of this exercise was simple - to get the group to look at their situation from a different angle. It was my observation that their attachment to written charts was a factor in both their client and staff retention problems; the more the hospital grew, the worse the problem became. By relying on written records, literally every interaction with a client, whether in-person or on the phone, required someone to stop what they were doing and pull a chart. Therefore, each additional chart was only compounding the problem.

The bottom line was that despite all of their good intentions, this practice was no longer able to provide the client service and personal attention that they had previously been known for. Far too much time was spent looking for, writing in, or filing charts. Their consistency of care and accurate record keeping were also an issue, because the atmosphere was rushed and so were their records. If a client called and the doctor didn’t have the chart in front of them they either tried to “wing” it and then remember to pull the chart later and document the conversation, or they put the client on hold until the chart could be found. Often, by the time they returned to the line, the client had already hung up.

While the rule at this practice was that the phone must be answered by the second ring, it had become nearly impossible to do so, because too often a receptionist was running around the hospital looking for a medical record.

A perfect example of a lost bonding opportunity occurred one morning when a new client (we’ll call him Mr. X) came in with his two dogs. He had just moved to the area and his dogs were due for their distemper vaccine. The dogs were clearly stressed, tugging on their leashes and whining loudly, and the situation was escalating. Unfortunately it took over ten minutes just to get checked-in; one of the team member was dealing with a critical situation, and the other ended up spending over 10 minutes (excluding the time she had to put the client on hold to find the chart) trying to page through a record to decipher whether there was a refill available on a pet’s medication. When she was finally able to assist Mr. X, she was clearly nervous because she was anticipating that he was already upset and frustrated.

When Mr. X was escorted to the exam room the technician took the dogs’ history, but then had to spend 5 minutes writing it in the chart before announcing that the room was ready for the doctor. I could keep going, but the bottom line was that by the time the chart made it back up front so that Mr. X could be checked out, he had been there for over 50 minutes for two vaccines. His impatience and frustration were palpable, and it didn’t help that the receptionist

had to wait for the chart to make its way back up front in order to check him out. I later asked the receptionists how they thought the appointment had gone. They responded, "There is no way he'll be coming back here – this is what we have to deal with all day long, and it's not fun!" I had to agree with their prediction, but only time will tell if Mr. X will give them another shot.

And then there's that phrase that anyone who has worked in a practice with written records knows all too well... "I can't find the chart." What follows is a frenzy of activity trying to check every possible place in the hospital where it could be. If the client happens to be waiting, it doesn't matter whether they heard you say this or not; they know exactly what is going on. Why else would you be furtively glancing over at them, while whispering pleas for assistance to your co-workers?

The bottom line is that while a client may think your practice looks beautiful and are pleased with the medical care their pet received, it will not be enough to keep them coming back when they are adversely affected by your inefficiency. Granted there are some clients that will remain loyal through thick and thin, but most will look elsewhere without hesitation if you fail to meet and exceed their expectations. These expectations often have absolutely nothing to do with veterinary care and everything to do with the inefficiencies in your practice. Remember that like it or not, every 5 minutes feels like 15 to a client! If by the time they pull out of your parking lot they are already late picking up their kids from soccer, there is a high probability that the next time they need a veterinarian they will call the clinic they passed on the way over to yours.

Just as important, is the potential cost of staff turnover due to increased stress and job dissatisfaction. It takes time to bond and build lasting relationships with clients and their pets, and your team members can't do this if they don't have the freedom and opportunity. It is your receptionists that bear the brunt of client complaints, and it can become an exhausting and miserable experience.

As we choose to grow our practices we must accept the fact that some of the old systems are no longer adequate to keep up with an increasing number of patients, while at the same time consistently meeting and exceeding our clients' expectations. The hairline crack that used to be the margin for error at your practice can quickly grow into a chasm if you do not add new efficiencies to handle the increased volume of clients, patients, doctors and staff.

I realize that this may sound simplistic, which is not my intent. I am in no way suggesting that just because you have written charts your practice is a den of chaos. Nor am I suggesting that going paperless will solve all of your problems, if you have any. What I am suggesting, though, is that electronic records, once implemented, can greatly improve the accuracy, productivity, client service and even job satisfaction at your practice.

And just in case you're wondering what came out of that staff meeting... I am pleased to say that the entire team agreed to take the next step and begin the process of converting to electronic medical records... but that is a topic for a whole other article!

