

Time, technology and herds: time management through staff efficiency



Devendra Patel (BE(Elec), ME(E&E), MemIEEE, MemNZSA) Devendra Patel is the Managing Director and CEO of Computer Fanatics Limited, developers of VETLINK^{SQL}. He holds a Masters Degree in Engineering from the University of Auckland and has served there as an Academic Staff member in the past. His experience includes working for multi-nationals like Fujitsu in IT, and others in the USA in the area of oil exploration around the coastlines of many countries around the world. He has served as an executive board member with the New Zealand Software Association and is involved with the University of Auckland Business School mentoring students to commercialise innovation. Patel has been involved in software development for over 25 years, initially for the Pharmacy industry and now passionately involved with VETLINK^{SQL} - Practice Management Software for the veterinary industry.

Veterinary Practices have come a long way in terms of using computer technology. Initially, large animal practices were the first to adopt computers; this was out of necessity to ensure that Farmers were billed out accurately, accounts collected on time, and bad debtors identified easily. Since then of course a great deal of software development has been focussed on small animal practices. Recently most software vendors have refocused on new development for large and mixed animal practices. These are innovative measures to assist practices streamline their operations, optimise and measure staff resources and productivity, and provide better and timely communication to their clients and field staff. In this article we will look at how far appointment systems have come and why mixed and large animal practices are now embracing this technology.

The very nature of the business revolves around time management with unplanned disruptions. Limitations of past technologies simply made practices default to using pen, paper and the elusive eraser. To convince users to go fully on to computer based appointment books in the large animal sector, many vendors have now rewritten their systems using newer and smarter technologies.

Rosters

What has changed in the Veterinary Industry in recent years? Well, practices have grown in size with multiple branches and increasing staff numbers; parenting staff require more flexible working hours, and many large animal practices have expanded into small animal medicine.

For these reasons, it has become paramount that any appointment book must now have the ability to use powerful staff rosters to plan staff availability. A graphical appointment diary "painted-off" such a roster is the ideal solution. Of course post-allocation management including roster re-modification from a management perspective, and one-off manual overrides must have the appropriate embedded business logic to manage "clashes", resulting in the correct outcome. Most systems available today should have smooth "drag n drop" and "stretch and squash" ability; this will be the only way to convince multi-tasking staff to use it when receiving calls from field staff and clients alike. When a vet calls in and says "I still have issues here; I won't be able to make it until 4pm for my next call," a staff member must be able to simply stretch that appointment to 4pm while having one hand on the phone. It should be far easier than having to update a book, or staff will simply not embrace it. While accurate appointments and times spent at client sites are excellent indicators of staff availability, there are many other benefits. In addition to billing more accurately for time spent, this data can also be used to analyse staff and clinic productivity and efficiency (productivity refers to revenue generated per hour in the time rostered; efficiency refers to revenue generated per hour in the time spent with a client/patient).

Smart text messaging

Once appointments have been made, communication with clients and field staff is essential. Being able to leave messages for yourself or others, to be completed on specific days, also leads to smooth and documented messaging within the practice. Two-way text messaging is very popular where text messages can be sent with a request for reply – this reply can then automatically complete tasks such as an appointment confirmation without any human interaction, returning staff productivity back to the practice and freeing up phone lines for more important, and hopefully revenue generating calls. With most modern systems, appointments and staff messages can also be texted directly to them in the field. Another new technology found in most systems will facilitate text "threads"; this allows back and forth

communication on a single "thread" with a staff member or a client directly from the appointment screen. Again, this is fast, efficient and fully documented – either party can read and acknowledge once ready to respond. It is also a far more cost effective way to communicate than calling mobiles.

Live access

For staff with laptops and a 3G connection, well designed and graphics optimised appointment screens will work well. This leads to "live" data availability to all concerned and brings about increased efficiency to the entire practice.

Web intergration

Many appointment books can now be integrated to your website. This can allow your clients to check their own appointments 24/7 without having to call the vet or the clinic; again, such technologies can reduce unproductive incoming phone calls and return human capital back to the business. With some systems, clients can even request appointments online with preferred options which the clinic can confirm automatically after the appointment is made via an intelligent email that, when saved by the client, can enter the details into their Microsoft Outlook or Google calendar automatically.

Flexibility

For an appointment book to work well in a large animal practice there are other features that are essential. These include the ability to make multiple appointments for multiple Vets for a single job and multiple appointments for a single client for multiple jobs. Any billing from here will also automatically bill all calls/procedures and assign the correct Vet to each call/procedure. Modern software can now also provide general "sector" location of a client graphically when making an appointment to allow practices dealing with large geographical areas to collate calls in each direction and allocate Vets for the most efficient way to schedule calls for a day.

Animal health plans

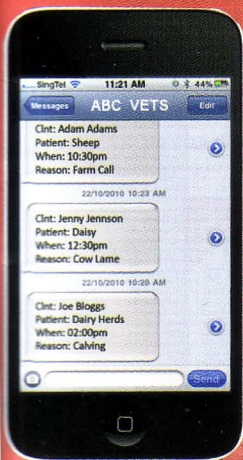
For those practices that are not using proper online animal health planning systems (eg. www.animalhealthplan.com – a topic for another day), many practice management appointment systems will have a feature sometimes referred to as "Standing Appointments" or "Recurring Appointments". Such a feature allows embedded recurring appointments to be "scripted" for patients or farms. These are then allocated as the roster "paints" the appointment book forward automatically. On most systems business logic will allow clash management in case the allocated staff member is unavailable on a particular "third Tuesday of every fourth month" that has been scripted in for a farmer. Using such a feature, you are able to program in various "pencilled in" appointments for farmers with an animal health plan that you may have developed. Confirmation features then play a part as these appointments approach. All such features should be readily available in most modern practice management systems today, or you simply cannot manage the most expensive resource in your practice – your Staff's time!

A large animals vet's perspective

by **Duncan Runciman, BVSc (hons), PhD,**
Partner: MAFFRA Veterinary Centre, Victoria

At our practice, we have recently implemented a Practice Management System diary that allows us to schedule 10+ vets doing small and large animal calls, and a technician, all on one diary, and all visible on one screen. Calls can easily be moved from vet to vet, and multiple vets doing the same call have linked appointments. *To page 53*

Staff	AE - Andrew Everge...	CS - Carl Summer	JH - Jeal Hoffman	JC - John Connolly	MT - Maxine Taylor	NR - Nicole Rowe
08:00						
09:00						
10:00	Windy Station Sheep [FE] Sheep [S...] Farm Call 09 125 456(W) / 09 12... 9:00 a.m. - 11:30 a.m. (L)	Wesley Farm Cattle [FE] Cattle Dair... Dairymen 09 785 434(W) / 09 78... 9:00 a.m. - 1:00 p.m. (L)	Locked Daily day 9:00 a.m. - 4:54 p.m. (L)	Archer Jeffrey Sheep [FE] Cattle Dair... Farm Call 409 228(W) / 09-213...	Collins George Sheep [FE] Sheep [Z...] Lanes 11:30 a.m. - 1:30 p.m. (L)	Isaacs Roy Bob [ME] Cow (1711 p) Selling 09 489-228(W) / 021... 10:00 a.m. - 12:30 p.m. (L)
11:00						
12:00						
01:00						
02:00						
03:00						
04:00						
05:00						
06:00						



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The billing process is then very easy. By clicking on an appointment, the billing screen is opened to the right patient on the right day. The colour coding allows us to easily track what calls are waiting, those that are done and what stage of billing each call is at. We even link calls between different diaries so we can view a day's large animal work in a list view or in the graphical diary view. Staff that are away or doing surgery can be locked from different diaries so they are never double-booked. Our branch practice appointments are easily accessed "live" from the same diary screen; appointments can be made for staff at either clinic from a single location.

Some of our vets on the road also use 3G network cards on their laptops and connect directly to our server. Billing can be done at the time of consultation; appointments can be checked and made. We have full functionality via remote connection including

making appointments, adding patients and clients and changing stock prices. No synchronisation needs to be performed back at the clinic, leading to huge efficiency within our practice.

SMS messaging between the clinic and remote vets allows for appointment and messages to be sent to vets during the day. Vets are able to respond via SMS if required. The ability to have multiple "stores" within each Branch means that stock can be monitored for each vet car. Stock transfer between the main clinic, branch clinics and cars is so easy. Each job is then booked out from the respective store meaning that stock control can be kept tight for each mobile vet.

We have now discovered that such advanced appointment systems can be implemented easily and soon become the most actively used part of the entire practice management system, as most tasks can be recorded here, and then processes "spawned" to complete and document them efficiently.