**TIME-SAVING TECH**
Practice information management systems are designed so veterinary professionals spend less time on paperwork and more time treating patients.

PRACTICE MANAGEMENT

# Integrated Solutions

*Scott McKinney*

A practice information management system (PIMS), also known as veterinary practice management software, offers veterinarians and practice managers assistance in nearly every component of a veterinary business, tracking patient flow, client communications, billing, patient history, and more.

But not every PIMS is created equal. In fact, they come in a variety of formats, offering various integrations, tools, and compatibility. It's not enough to just have *any* PIMS, but it's increasingly important to learn about each function of the system and make sure it suits your needs and preferences. If it doesn't, there's sure to be a product out there that offers what you need.

Here is a look at some of the tools and benefits of many popular veterinary PIMS on the market.

## eVetPractice

eVetPractice (Covetrus, **get.covetrus.com**), which began in a garage in 2011, quickly grew into one of the most-used software packages for veterinary practices. It's now under Covetrus, granting access to the Covetrus platform in an integrated, seamless user experience. Covetrus' robust resources allow it to quickly adapt to customer needs, such as developing telemedicine offerings during COVID-19.

"All users need to do is click a button to add videoconferencing to any appointment," says Benjamin Estes, a principal product manager at Covetrus. "A good use case for telemedicine is initial triage for injured pets—the pets get treated and the veterinarian maintains continuity of care, which helps keep business within the practice and increases pet owner loyalty."

Dr. Craig McLahan, founder of Bridgeport Veterinary Hospital in Bridgeport, Pennsylvania, chose eVetPractice when he started the hospital in 2018. McLahan previously worked as a relief veterinarian and found eVetPractice to be the most user-friendly software on the market. "There's a lot of redundancy, a lot of ways to do the same thing," he says. "I'm not the most computer-savvy person, so I found it remarkable I could be gone for a month, then pick right up where I had left off without needing a refresher or tutorial."

McLahan worked with consultants to start his practice, and eVetPractice helped monitor key performance indicators (KPIs) they asked him to track. The way the software interfaces with lab reports, prescriptions, and inventory has been helpful, he says.

As a client-centric veterinarian, McLahan finds the client communication suite especially useful. "A big thing in veterinary medicine is owner compliance. We

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want to call them back and make sure the patient is trending in the right direction," he says. "That happens automatically, which is a really good feature."

## ezyVet

"We're trying to eliminate tedious admin tasks across clinics and automate as many processes as possible, whether it's invoices or client communication," says Glen Jones, enterprise business development manager at ezyVet (**ezyvet.com**).

This software maintains a curated ecosystem of integrations with over 120 partners. These include everything from distributors to customer reviews and data analytics. The aim is to give customers a platform that drives financial and clinical performance.

As you perform services throughout your practice, they're automatically billed and added to the invoice, so the actual invoice creation happens in the background. This helps increase cost efficiencies and capture more revenue. Clinics typically see a revenue uplift of at least 10% when they move to ezyVet, says Jones.

You can also build workflows and templates based on your practice's unique clinical process. "There are a lot of templates you can build across ezyVet," Jones says. "The aim is to drive efficiencies in your clinical workflow and note taking and reduce the time taken doing admin. You should be able to focus on what you love and spend more time caring for animals."

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## Hippo Manager

Hippo Manager's name is a nod to HIPAA compliance. "We believe that vets own their data and should use it to help their own businesses," says Sam Razor, founder and CEO. "We not only protect their data, we never share it without their explicit permission."

The software (**hippomanager.com**) offers integrations with several of the best-in-class client communication tools and pharmacy and wellness plans. It prioritizes flexibility for clinics to customize workflows and charges a rate of $119/month per full-time veternarian, with no charges for additional users or data storage.

### The Perfect Fit

All PIMS providers can describe the bells and whistles in their software, but how do you know which features are right for your clinic? Consider these factors when researching which PIMS will create a more efficient workflow in your day-to-day practice.

**Tech Specs**
A veterinary PIMS should cover the basics of patient care, such as charting. Remember, the PIMS you choose will be the foundation of your practice. It is critical that it's capable of syncing with other tools and services in your practice, such as prescriptions, in-house diagnostics, and external reference labs.

**Business Management Tools**
A veterinary PIMS should incorporate business functions, such as billing, scheduling, reminders, wellness plans, inventory management, and financial reporting.

**Training and Tech Support**
You shouldn't need an IT degree to learn how a PIMS works or to solve a problem that pops up. Good PIMS providers should provide initial training, ongoing education when updates are made, and responsive IT support.

**Data Privacy**
The PIMS is your repository of each patient's medical history and client information. Strict security is paramount to keeping your practice details and sensitive material safe and protecting the contact and payment information of pet owners.

**Ready for the Future**
Ask the PIMS provider about update capabilities. A PIMS platform should be flexible and able to expand to accommodate the ever-changing needs and services of the veterinary industry and your clients.

**At-a-Glance Features Chart**

| | CLOUD-BASED, SERVER-BASED (OR BOTH) | MOBILE APP | APPOINTMENTS/ REMINDERS | BILLING & INVOICING | PATIENT RECORDS MANAGEMENT |
|---|---|---|---|---|---|
| eVetPractice | Cloud | | ✓ | ✓ | ✓ |
| ezyVet | Cloud | ✓ | ✓ | ✓ | ✓ |
| Hippo Manager | Cloud | | ✓ | ✓ | ✓ |
| IDEXX Cornerstone | Server | | ✓ | ✓ | ✓ |
| IDEXX Neo | Cloud | ✓ | ✓ | ✓ | ✓ |
| NaVetor | Cloud | ✓ | ✓ | ✓ | ✓ |
| Provet Cloud | Cloud | ✓ | ✓ | ✓ | ✓ |
| Shepherd Veterinary Software | Cloud | In development | ✓ | ✓ | ✓ |
| Vetter Software | Cloud | | ✓ | ✓ | ✓ |

*SOAP=subjective, objective, assessment, and plan.*

Notable among PIMS, it offers training and coaching hand-in-hand with the software, with more than 100 free online classes for how to use the software. Its executive coaches help veternarians improve their business practices.

"We see software as the operational background—it integrates with so many more parts of the practice," Razor says.

Hippo's coaches start by looking at which reports you should be running, then determine what changes you should make from that data. Other coaching focuses include improving recruiting/hiring, employee handbooks, and team building. Recently they've focused on helping clinics implement the wellness plans available through their partnership with provider VCP.

"Customizable workflow software is especially critical during uncertain times like these because it allows veterinarians to easily adapt processes and implement new protocols, such as curbside check-in."

## IDEXX Software

IDEXX (idexx.com) offers multiple PIMS options, such as Cornerstone and Neo. Cornerstone features tools to maximize efficiency in the clinic, such as diagnostic integration and compliance assessment, which help identify every care option. Among Neo's many features, IDEXX touts the software's ability to quickly streamline your workflow and its built-in training and tech support. But the benefits of these PIMS are magnified when paired with IDEXX's SmartFlow Patient Workflow Software, a tool that works with several leading practice management sofrware products.

"SmartFlow Patient Workflow Software helps practices streamline every step of the patient visit. It captures every detail, treatment, and service administered as the team moves throughout the clinic, sending all forms and documents to the patient record and automatically adding charges to the client invoice," says Rachel Houlihan, senior director and general manager, IDEXX Veterinary Software and Services. "Customizable workflow software is especially critical during uncertain times like these because it allows veterinarians to easily adapt processes and implement new protocols, such as curbside check-in," she says.

"The biggest business problems that SmartFlow fixed were related to patient care, keeping my staff actively paying attention to patient needs, and capturing missed charges," says Dr. Jillian Salisbury-Brickey, owner of Scioto Trail Animal Clinic, Portsmouth, Ohio. "SmartFlow helps me streamline treatments for my patients and capture charges that might have been missed, therefore increasing patient care and revenue."

| IMAGING & X-RAY MANAGEMENT | TREATMENT PLANS | PRESCRIPTION MANAGEMENT | LAB INTEGRATION | INVENTORY CONTROL | SOAP NOTES AND REFERRAL LETTERS |
|---|---|---|---|---|---|
| ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| ✓ | ✓ | ✓ | ✓ | ✓ | |
| ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| ✓ | ✓ | ✓ | ✓ | In Development | ✓ |
| ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |

## NaVetor

A budget-friendly monthly subscription for NaVetor (Patterson Veterinary, **navetor.com**) includes all the software features you would expect, plus a mobile app, automatic updates, cloud-based data backup, free boarding module, and integrations for credit card processing, microchip identification, and email and text messaging. Technical support is offered 24/7 via phone, email, chat, or directly through the software.

Approximately 100 clinics are using NaVetor, which has a unique connection to sea turtles. "For every purchase of NaVetor software, we make a donation to the Texas Sealife Center, on behalf of the clinic, to help rescue, rehabilitate, and return endangered sea turtles to the ocean," says Dan Holland, Patterson Veterinary's director of technology. "Since part of our inspiration for the software came from sea turtles—which are known for their navigational abilities—we thought it would be appropriate to help give back to this cause."

Veterinary teams may like the contribution to sea turtle conservation, but there are several features that make NaVetor appreciated in the clinic, too. For example, the reminder feature functions more like a wellness plan than a traditional reminder system.

"Once the patient's breed, age, and health details are entered, reminders are triggered by life stage, rather than the prior appointment," says Holland. "If a patient happens to miss an appointment, future reminders are already in place, so patient wellness stays on track." The Treatment Sheets feature is also popular. "Staff members can check tasks off from a checklist, and the software automatically adds them to the SOAP notes and invoice to capture charges and create a complete medical record," Holland says.

## Provet Cloud

Provet Cloud (**provet.cloud**) checks all the feature

## Stay in Touch

PetPro Connect and Weave are not PIMS. They integrate with the PIMS to facilitate customer communication.

**PetPro Connect**

PetPro Connect (Boehringer Ingelheim, **petproconnect.com**) is a free client collaboration platform that integrates with all the major PIMS.

"You've got to go beyond the PIMS to stay truly connected with today's pet owners," says Heath Wilkes, Boehringer Ingelheim's U.S. head of digital health. "We're coming in with this idea of giving better collaboration, better virtual care, and a better overall experience between visits."

Wilkes sees PetPro Connect as a kind of Slack for pet care. The key features center on appointment scheduling, a robust messaging platform, shareable medical history, prescription refills, and rebates redemption. One of its big successes is its loyalty program, a point-based system that helps upsell and cross-sell at the clinic level.

Curbside telemedicine has also been popular amid coronavirus disruptions. PetPro Connect users can access the platform for real-time video communication with their clinic from the safety of their automobile.

That's been successful, particularly given that 62% of pet owners are millennials or part of Generation Z. These owners often map to the persona of a "helicopter parent," and want to know every detail of their pet's treatment. "We're not trying to be a virtual alternative," Wilkes says. "We see our job as helping empower that veterinarian in this changing landscape."

**Weave**

Weave (**getweave.com**) is a phone system that integrates with your PIMS to facilitate customer and office communication.

"Weave has been a huge value add for veterinary offices, especially with the touchless payments and curbside check-in we're seeing," says Sean Gove, senior partner manager. "It helps offices become more efficient, schedule more appointments, and attract more customers."

The way it works is Weave becomes your phone provider. This often saves offices money on their phone bill alone. It includes desktop software that stores client information and notes, so you can give a red-carpet approach every time a customer calls.

Features include a texting-based review platform that helps offices increase their online review presence, text to pay, and a Missed Call Text feature that immediately texts missed calls back. Weave has seen new client acquisition boosts of over 30% from this feature alone.

It supports two-way texting from desktop or mobile app, and all texts show they are coming from your office phone number. This increases click rates since clients know it's coming from their vet and it maintains practice privacy. "Think of it as caller ID on steroids," Gove says.

Other features include a texting reminder system for billing, digital faxes, and hourly analytics tracking. Payment is month-to-month, with no contract required.

boxes, but what makes it different from other software is the workflows and ease of use within those features, says Jordan Holmes, U.S. sales manager.

"We're built modularly, which allows us to customize fields and functionality to each practice's needs," Holmes says. "The goal is to create an easy-to-use system custom to each practice's particular needs."

> "The goal is to create a simple, easy-to-use practice management system custom to each practice's particular needs."

Provet has additional smart features to automate the process of clinical notes, discharge instructions, and reminders. Its open API allows practices to integrate their own tools in the background, such as automatically populating estimates into a PDF format.

Another notable feature is a shared inbox. "It's an email address that you get with each Provet Cloud account," says Holmes. "Veterinarians or clients can send emails to that address and it will automatically log into that patient's communication record."

### Shepherd Veterinary Software

As a veterinarian seeing patients and a practice owner wanting to grow her business, Dr. Cindy Barnes couldn't find software that met her needs—so she built Shepherd (**shepherdapp.com**) from the ground up. Shepherd's goal is to bring all of the functionalities and features needed to run a practice into a single platform.

"The common flow is you see a patient and complete their medical record, then create an invoice, discharge instructions, and educational info for the client," says Amber Pistone, customer care manager at Shepherd. "That takes time away from your practice and leaves room for human error—and more often than not, missed charges."

Shepherd replaces these manual processes with a completely automated system. "While you're seeing the patient, you fill out the simple and intuitive physical exam template and mark treatments as complete, and the software populates the records, reminders, discharge instructions, and invoice automatically," Pistone says.

Shepherd says clinics realize increased revenue due to captured charges—Dr. Barnes saw an immediate boost when she implemented beta versions of the product in her practice—and a more efficient workflow, thanks to reminders, emails, text messages, and an internal whiteboard system.

## Vetter Software

Integrated wellness plans are a key differentiator for Vetter Software (vettersoftware.com), says Christie Krepol, practice manager at Unity Animal Hospital in suburban Philadelphia.

"None of the software we used in the past had built-in features we could use to implement the plans," Krepol says. "With our old software, we had to print a list every day to check who was coming up for renewal. Vetter's plans are a lot easier, thorough, and more accurate. You can store a credit card securely. Our old software wasn't able to do that."

Vetter Software's driving principles include automation and high adoption rates. It analyzes usage data and customer feedback to guide new development.

Earlier in 2020, Vetter launched a treatment board that projects on a TV. Each patient has a row and a defined list of activities for the veterinary team, such as giving medications or taking vital signs. The board updates in real-time as staff members record treatments on their individual devices. It integrates with the rest of the system to update medical histories, inventory, and the invoice.

"The treatment board constantly prompts users to look at what's next, and they're looking to the left side of the screen instead of across the entire spectrum of patients and times," says Sagi Solomon, CEO of Vetter Software. "Each practice can determine what can happen for a given procedure, and you can interrupt or redirect treatment in case something unexpected comes up." TVP

**Scott McKinney**

Scott McKinney is a Knoxville-based freelance writer specializing in B2B software. Unlike other writers, he comes from a mathematics background. He has a BA in math from Cornell University and 15 years experience teaching and tutoring advanced math. Now he works with trade publications on articles about software and writes marketing materials for software companies. When he's not working, he walks 3 to 5 miles a day and practices Qi Gong.