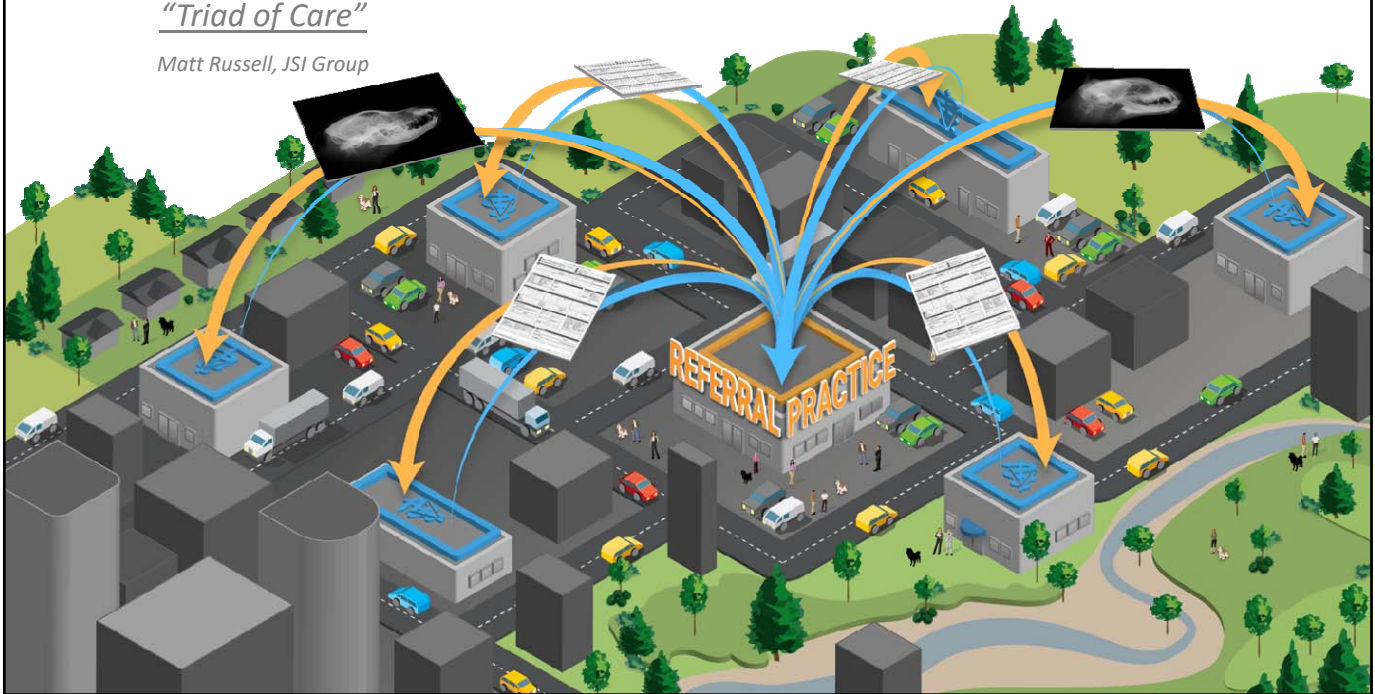


Utilizing Technology to Enhance the "Triad of Care"

Matt Russell, JSI Group



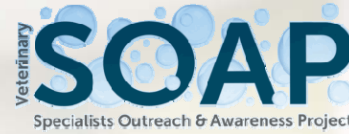
Referral Management Tools

- ✓ **The Referral Life Cycle**
 - How to simplify using technology
 - Online referral requests
 - Going mobile
 - pDVM portal
 - Ongoing awareness...digital alerts
- ✓ **Growing & Enhancing the Relationship**
 - eMarketing Tools
 - Considering a CRM?
- ✓ **Maximizing Your PIMS (aka EMR)**
 - Referral features, where are PIMS going?
 - Using your PIMS data
 - BI, reporting tools





2013 Corona Insights Survey



2015 Study on Referral Dynamics

- ✓ Understanding of services offered
- ✓ Setting the right case expectations
- ✓ Ease of referring
- ✓ Timely communication, case follow-up, transparency
- ✓ Expectations for ongoing treatment

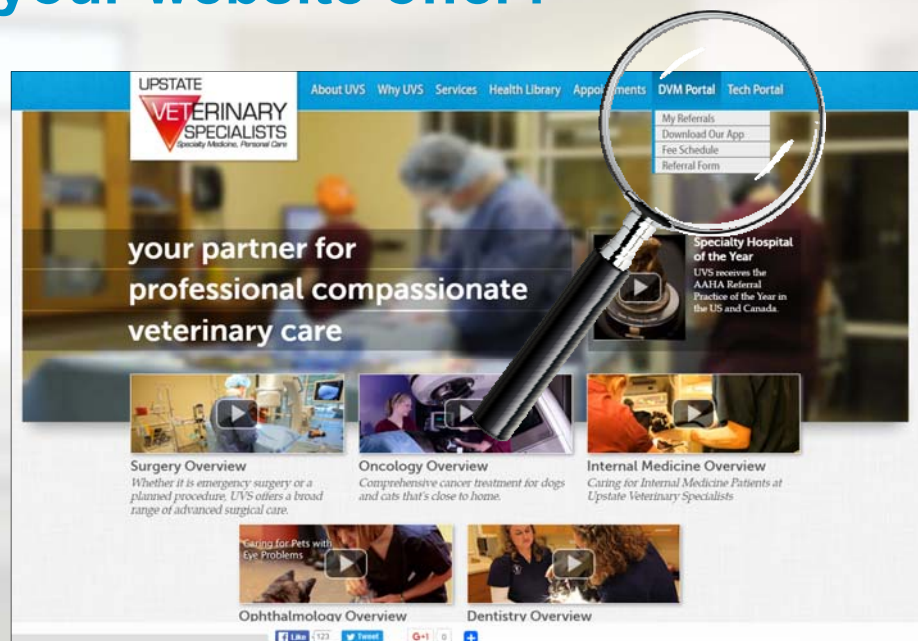
Key pDVM concerns that can be managed with technology solutions



The Initial Referral, Scheduling & Case Data Collection

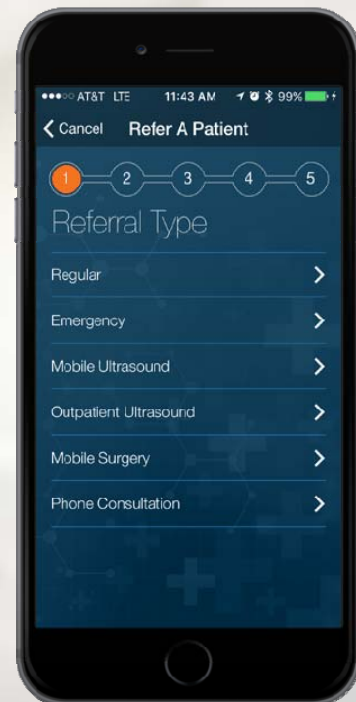
What does your website offer?

- ✓ Case submission functionality
- ✓ Document and image upload
- ✓ Access to pending referrals
- ✓ Fee schedule, estimate generator



Be Mobile Friendly

- ✔ Offer mobile referrals
- ✔ Accept email and txt referrals
- ✔ Make sure your referral forms are mobile friendly
- ✔ Consider a Case Referral App



The image shows two smartphones side-by-side, both displaying a mobile application titled "Refer A Patient".

Left Smartphone (Patient Information):

- Progress bar: 1 (selected), 2, 3, 4, 5
- Section: Patient Information
- Form fields:
 - Name: Brutus
 - Sex: Male Neutered (dropdown)
 - Breed: Canine (dropdown)
 - Color: Boxer
 - Age: Fawn
 - Age: 4
 - Rabies Vaccination (Date Last Given): January 12, 2016
 - Radio buttons: 1 Year (unselected), 3 Year (selected)
- Next button (orange)

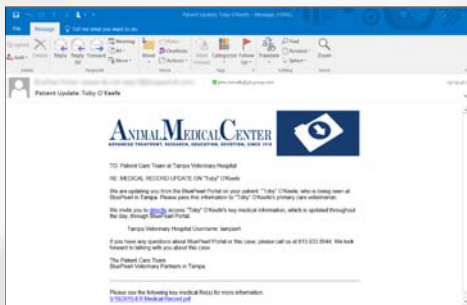
Right Smartphone (Reason For Referral):

- Progress bar: 1, 2, 3, 4 (selected), 5
- Section: Reason For Referral
- Text area: * Required
Cruciate ligament rupture, consult for sx repair
- Media Upload section: Includes a photo of a dog's leg.
- Media Comments section: Empty text area.
- Submit button (orange)

Arrival, Treatment & Discharge

Automated email, fax and other alerts

- ✓ Check-In Notifications
- ✓ Patient Update Notifications during treatment
- ✓ Discharge Notifications
- ✓ Ongoing record updates as information becomes available



pDVM Web Portal

- ✓ Track check in/out activity
- ✓ Access medical hx information
- ✓ Referral reports
- ✓ Lab results
- ✓ Image studies
- ✓ Prescription information
- ✓ Other key referral information



pDVM & Client Follow-Up

Following Up, Rechecks

- ✓ Continue to provide update notifications as additional results become available
- ✓ Client care calls and emails, keep pDVMs in the loop
- ✓ Health service reminders, keep the pDVM involved/aware of follow-up care
- ✓ Track practice and pDVM follow-up preferences in PIMS or CRM



Growing & Enhancing the Relationship

Why consider a CRM?

- ✓ Does your PIMS offer the functionality needed to fully manage pDVM relationships?
- ✓ Are you performing visits, follow-up calls to your referral base and recording the results?
- ✓ Where do you document pDVM requests, preferences and track progress?
- ✓ Where do you set and track referral goals?



Some of the top CRMs...

Infusionsoft.



eMarketing Tools

- ☒ Are you surveying pDVMs? Are there opportunities to provide feedback during a case?
- ☒ eNewsletters- announce new services, articles, case studies, CE opportunities
- ☒ Social engagement with your pDVMs
- ☒ Share content pDVMs can use on their website, help them market

- ☐ Random assessment of how cases were handled
- ☐ What other services can we offer?
- ☐ What would make referrals easier?
- ☐ Here's what your clients are saying about us...

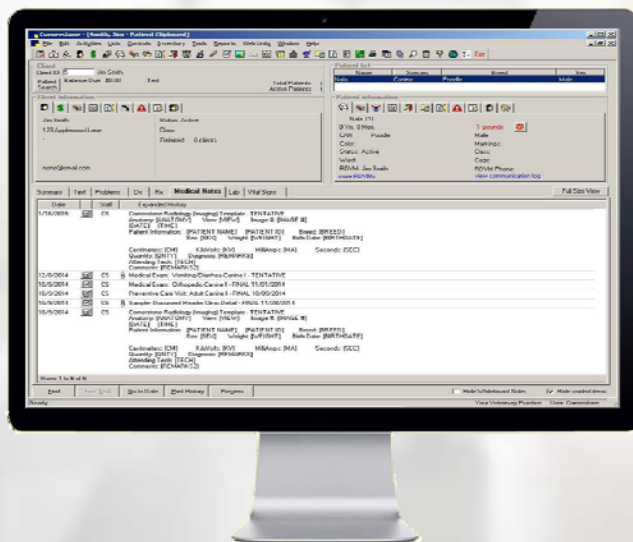


Maximizing your PIMS

- ✓ Very few PIMS are designed to support referral workflow
- ✓ Most are just adapted from general practice functionality
- ✓ Cornerstone, DVMax, ImproMed popular in specialty/emergency
- ✓ Where are PIMS going, who is emerging in this space?



PIMS limitations lead users to explore other solutions and leverage their data with companies that are truly innovating.



BI / Reporting Tools

- ✓ Tracking referral metrics through data integration
- ✓ Several powerful BI tools on the market that can be connected with data sources...CRM, PIMS
- ✓ Are you measuring?...
 - Referral volume by practice
 - Referral volume by pDVM
 - Volume by case type
 - Incremental referral growth
 - Setting and tracking referral growth goals
- ✓ Measure the results of your pDVM marketing campaigns
- ✓ Provide scorecards for referral coordinators



More work to be done...

- ✓ Bidirectional record sharing between pDVM and Specialty/Emergency, what's holding us back?
- ✓ Deeper integration with PIMS
 - Data, report write-back
- ✓ Learning Management Systems – Integrated CE





Connected, Coordinated, Care.

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