Going Paperless

IMPROMED®

IMPROMED EQUINE®

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Welcome to the Journey!

The secret to going paperless is this: There is no secret.

Practices have been paperless using Covetrus® Impromed software for many years. Several practices even made the transition to paperless record keeping using many different practice management software. Consider the fact that these brave pioneers might not have had:

- The EasyTime Appointment Scheduler

- In-program Consent Forms

- Canned Estimates

- Compliance Lists

- The ability to update database records from the many locations

- Clinic Census

- Electronic Travel Sheets

- Treatment Plans

- Episodes of Care

- Electronic forms of internal and external communication

Because of these and many other innovations, Impromed makes going paperless easier than ever before.

This document is designed to guide you through the process, step by painless step. We have designed a simple, logical process that will facilitate your business changes. The beauty of this guide is that it eliminates most guesswork and what-comes-next questions – we have already made a timeline for you to follow, which you can customize to meet the specific needs of your business.

We've done the heavy lifting, so you don't have to.

This document is divided into a 12-phase timeline (a brief overview appears in **"Appendix A: Going Paperless – A Step By Step" on page 43**), written specifically to take advantage of all the strengths of Impromed. Each phase can be as long or as short as you need it to be, whether you need two weeks or two months.

No matter how long your phases are, you must choose two things before you begin – a starting date and an ending date. Doing this helps to ensure that each part of the process doesn't get put off indefinitely.

Why Go Paperless?

There are many reasons you may be considering becoming a paperless practice. Among them are sure to be the elimination of filing time and knowing that every patient record is available from any computer at any moment, instead of in a folder in the wrong room at the wrong time, or misfiled – in other words, lost.

There are other obvious benefits as well. Poor handwriting will no longer be an issue, eliminating misunderstood notes. This clarifying of records always makes the review board happy and improves clarity of communication between all staff members.

Electronic record keeping expands the searchability and marketing capabilities of your data. Storing more information in your computer system creates more opportunities to track and evaluate key parts of your business.

Paperless medical records can also increase revenue and customer care by using medical-record driven invoicing. If a doctor enters information in the medical record, services and inventory items can be added to the invoice, eliminating missed charges.

Finally, even if you feel you possess minimal computing abilities, your clients will perceive your business as cutting-edge, knowledgeable, and competent.

How Will I Ever Accomplish This?

The key to this journey is that everyone must have the proper attitude: You can do it!

Everyone must be on-board in order for the process to be successful. This means staff members who are afraid of computers must learn to use them. A computer is another tool, no different than a stethoscope or a scalpel, which will help everyone to improve patient care.

If a fear of typing is present, you may choose to focus on using more point and click options for text entry, voice dictate in exams, or use voice-recognition software.

Your business may have staff members who are leery of using the computer more than they already are. Be sure your staff knows you will provide additional computer training time as needed, and that they will not be expected to be perfect from day one. Your staff needs to remember that the current way of doing things was new to them once too, but they adapted over time and this new adventure will end the same way – with better patient care.

Everyone's ideas and opinions must be taken seriously and implemented where applicable. Staff can have a lot of insight into what will work best for your business. The best way to make sure that everyone's concerns and ideas are addressed is to select one representative from each group of employees (DVMs,

office staff, technicians, assistants, kennel crew) and make them the "leaders" of the paperless transition. The leaders should then be involved in the planning part of each phase.

More importantly, they can become comfortable with each new process first, and then train the rest of "their" group. Knowing that someone will be there to guide them and that they will not be left to flounder on their own will keep staff members motivated and positive throughout the journey.

As the paperless transition continues, your newly appointed leaders will need to assess their followers' computer comfort. If there is a portion of the computer program that they are expected to use more than another, be sure they know as much as they can and are comfortable with this aspect of the program.

What If I Need More Help?

Impromed has many avenues for continuing education on our software, including videos). You may consider purchasing one or more days of education if feel you need intensive in-clinic training or would like the assistance of a trained Impromed educator to help guide you through the process.

If you ever have any questions, concerns or recommendations, please call us at (800) 925-7171 or email us at: **support@impromed.com**.

Necessary Tools

Often, the biggest problem with going paperless is not getting started – but being prepared to get started.

When you open a new veterinary business, you don't just walk into a building and start seeing patients. You set your prices. You bring in the proper equipment. And you make sure that you have ample staff to deal with the clients and patients you are going to be seeing.

Therefore, it is important before you even consider going paperless, for you to think about the tools you already have in your clinic, and what you are going to need to realize your end goal.

Hardware

While it is not imperative that you have all of the following items, it is wise to consider the advantages they offer.

- **Up-To-Date Computers** – Computers become obsolete faster than almost anything else currently in existence. New hardware is released on a weekly basis, and Microsoft® releases operating system updates almost every day. Even if you don't replace all your machines, a new server with more

memory, bigger hard drives, and up-to-the minute operating system updates will save you time and grief.

- **A Solid Network** – Often, people will let a friend or family member do their cabling. This is all well and good, but do you treat your car this way? If you heard a strange knocking in your engine, would you call your cousin, who took a shop class once? Of course not. You'd call a professional. And when your computer system is on the line, a real network professional could make all the difference between "the system is running great" and "the system is down again."

- **High Speed Internet Access** – This will allow you to download all your lab work directly into your system, and helps Impromed to assist you much more quickly when you have questions or problems. High speed Internet access also gives you quick access to information on products, medical resources, and educational opportunities.

- **Signature Capture Devices** - Having devices available to capture signatures on electronic forms, consents, and more provides an avenue for being flexible when you are practicing medicine. Capturing electronic signatures provides you with a permanent record that cannot be lost or accidentally destroyed. The mobility any signature capture device provides can help increase the perception of your business as cutting edge and can also help reduce missed charges by allowing charges to be entered as they are being performed. Signature capture devices can range from TabletPCs, signature pads, and other compatible devices.

- **Scanner** – Rather than entering all your old medical records into the system by hand, they can be scanned into the system as your clients and patients come into the business. Doing this can help to ease the overwhelming task of moving all your old records into your new paperless system at the same time.

- **Digital Camera** – This can be used to capture pictures of your clients and patients. In addition, it can help to document surgeries, dental cleanings, emergencies and other procedures. Storing digital images is another step in enhancing the perception of your business and adding to traditional medical records. A picture truly is worth a thousand words.

- **Lab Equipment** – Since it is now possible to interface Impromed directly with many in-clinic blood chemistry machines, you will want to check into whether your lab equipment can interface with the Impromed software.

Database

Without wandering too far into technical terminology, we must briefly discuss the role databases play in the big picture.

By definition, a database is simply an organized collection of related information. In the case of a veterinary business the database is all the clients, patients, medical history, and other information viewed through and used by Impromed to help you through your day to day operations.

How this information is stored, accessed and managed are very significant issues that anyone going paperless needs to be aware of. Quick access to all aspects of your data is a must in the paperless environment, as there is no paper record to fall back on. Likewise, the ability to quickly recover from unfortunate events or mistakes is also a concern.

Fortunately, Impromed is based on the Microsoft SQL database platform. SQL is one of the industry leaders in database management and is more than capable of storing massive amounts of data while maintaining a high level of performance and stability. The SQL database platform also has built in features that help protect data integrity, promote easy data recovery solutions, and allow the flexibility to utilize your data in many different ways.

Software

Often, it is possible to go paperless with only the most basic components of practice management software. However, it is important to note that additional features in a software program will enhance the paperless experience by simplifying and automating tasks they were specifically designed to accomplish.

Impromed, like most other practice management software, includes a core group of modules that are necessary for running a veterinary business and laying the foundation for creating electronic records of the business side of the veterinary business.

For example, Impromed stores all client and patient information in a database, and automatically records reminder and financial information based on what those clients purchase. These pieces of information are so commonly recorded by veterinary software, that people forget that they are paperless records.

The most common paperless components are:

- **Database** – Up-to-date information on your clients is a crucial component to going paperless. These records are the basis for your practice. Make sure that client information is up-to-date every time one visits. Impromed provides many places to update the client and patient information throughout the program.

- **Invoicing** – Part of a client and patient's history is built through charging them for goods and services. Accurate invoicing is another key to going paperless as it impacts the overall record you have concerning your financial relationship with your clients. Impromed provides ways to invoice from many different parts of the program, helping you to consolidate tasks.

- **Estimates/Consent Forms** – Although optional, Estimates are part of the core program function of Impromed as they can be used to create a record of the proposed treatment for a patient and digitally capture a client's signature on the associated consent forms. To collect client signatures, you will need devices capable of capturing signatures.

- **EasyTime (if applicable)** – Eliminating the paper appointment book is a must. The EasyTime Appointment Scheduler has been updated to be a client, electronic version of a traditional paper appointment book. Using EasyTime frees up counter space and helps manage your business day.

- **Clinic Census** - Provides an efficient way to track all patients through your practice, while providing wait times and who is available at all times.

- **Boarding (if applicable)** – In the same manner that EasyTime helps manage the day to day scheduling needs of the business, the Boarding Module is a tool to help with the details of the patients staying in the business over multiple days. Implementing a computerized boarding schedule removes additional paper from the business and creates a more centralized management point for the care of the patients in the business.

These are only a few of the core features that most businesses using Impromed are already taking advantage of. In their own way, each of these items has led the way to help transition the rest of the business to paperless record keeping.

And here you thought you were going to have to start from scratch.

There are several other components that need to be present to complete the transition to paperless record keeping. Impromed includes these features to make going paperless as easy as possible.

- **Medical Records** – Medical Records comprise one of the largest parts of paperless record keeping. Impromed provides a comprehensive and flexible Medical Records Module that will help you keep detailed records in almost any manner and format you may choose. Additionally, Impromed's Medical Records Module includes three text entry tools, VetNotes, Terms, and MacroText, which help reduce the amount of repetitive typing by making customized, pre-configured text available.

- **Lab Results Import** – Another major source of paper records are lab results. Whether they come from outside labs like Antech or VetConnect or from in-house chemistry and blood analyzers, labs are a key component of your medical records and another traditional paper record. Impromed provides interfaces with many different outside labs, integrates directly with many in-house lab machines, and various lab management systems.

- **Compliance Lists** – Another key component of making the transition to paperless is having methods in place to track recommendations made to clients and their intentions regarding recommended products and procedures. Impromed's compliance lists provide the tools to keep tabs on these items electronically.

- **Electronic Travel Sheets** – Another key program feature that is optional, but extremely helpful, is Travel Sheets. Electronic Travel Sheets move the charge sheet from the clipboard to the computer and integrates it directly with the invoice process to help reduce missed charges and move the process of tracking and entering charges into the practice management software.

- **Episodes of Care** - Help alleviate patient folders using the Episodes of Care. This module tracks your patient visits by glancing at invoices, treatment plans, and more at a glance while the episode is active.

- **Treatment Plans** - Treatment Plans are a centralized, business-wide view of all procedures that need to be performed for patients currently in the hospital. Streamlined with an enhanced look and feel for easier use, the Whiteboard[1] view allows you to see all patients in the practice at once.

There are many other software features that enhance the transition to paperless record keeping. We have only looked at some key components in regards to paperless record keeping. These and others will be detailed throughout this document.

Emergency Plan

Going paperless means less clutter, and less information strewn across desks and shelves. However, it also means that you must be prepared to recover that information through electronic means when machinery breaks down.

Before becoming paperless, you must make sure that your backup hardware and software is up-to-date, and that a staff member is made responsible for checking that the backup is running every day.

Having a Disaster Recovery Plan in place is an entire step in itself, and one that should be made whether you're paperless or not. For further information on this, please reference *"Appendix B: Disaster Recovery" on page 50*.

Phases

Each phase on the following pages describe recommended options Impromed may provide. Each phase is written as a Do and Plan portion for you to keep moving towards becoming paperless!

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[1]   Impromed v5.2 or higher; Impromed Equine v3.2 or higher

Phase 1

DO: EasyTime/Boarding

At a Glance

If you don't have EasyTime, contact your sales representative to order it.

1. Create Visit Reasons.

2. Link products to Visit Reasons.

> 📄 **Older versions of the Impromed program uses Appointment Types instead of Visit Reasons. Using the latest versions of Impromed/Impromed Equine allows your practice to get the most out of your software.**

3. Be sure doctors can schedule appointments from exam rooms.

4. If you board pets, contact your sales representative to purchase the Boarding Module.

5. Create Boarding Types.

6. Link products to Boarding Types.

In Detail

The majority of the veterinary businesses that have Impromed use EasyTime to manage their appointments. If you are already using EasyTime, congratulations – you have already completed much of Phase I. If you are not currently using it, now is the time to start.

The function of the EasyTime Scheduling Module is to take the place of your paper schedule. Designed to look like a standard appointment book, its interface is meant to take your book from a paper object that can only be in one place at one time to an electronic one that is available from every computer in your business.

In EasyTime, you have the ability to create Visit Reasons. Creating Visit Reasons will decrease the amount of time used to schedule appointments, as Visit Reasons will automatically fill out the length and type of appointment for you. An example of a Visit Reason is: Heartworm Test Only. They can be configured under Setup > EasyTime Appointment Scheduler > Visit Reasons (previously called Appointment Types).

You are also able to link products to Visit Reasons. For example, you can create an Visit Reason called "Feline Annual Exam/Vaccinations" that lasts 30 minutes. Once you have done this, you would move to Setup > Products > Linked Products and link the appropriate services: examination, FVRCP, rabies, fecal, and anything else you do on a yearly basis.

Generally, you will want to set them with a destination of "Estimates."

Now, when a patient is checked in, the approved charges will be waiting on an estimate that needs only to be amended, instead of newly created. By creating this Visit Reason and linking products to it, you have just insured that all the correct products have been invoiced and the reminders updated accordingly.

There is one caveat to this scenario: if you want to use Linked Products with Visit Reasons, you will not want to generate charges off of VetNotes, because things may be double-billed as the DVM builds the medical records. As a business, you will have to decide which system works best for you.

Make sure all staff members know how to use EasyTime and have the ability to schedule appointments from the exam rooms. This will help increase compliance, patient care and revenue.

The assistant or technician should attempt to make the appointment from the exam room instead of the front desk, where the appointment may be forgotten, easy to opt out of or inconvenient for the client to schedule while balancing a pet, child and calendar.

If you board at your facility, you will want to have the Boarding Module. The Boarding Module allows Boarding Types to be created and also linked to products.

PLAN: Laboratory

At a Glance

1. If you don't have the Lab Imports Module, contact your sales representative to purchase it.

2. Research your outside laboratories to find out if lab results can be downloaded into Impromed and Impromed Equine.

3. Create lab submission forms.

4. Create lab result forms for results that cannot be imported into Impromed and Impromed Equine.

5. Purchase a scanner for lab results that do not import or work for a specific form (history reports, etc).

In Detail

There are two primary ways veterinary clinics receive laboratory results: in-house machines and outside laboratories.

We will first address your in-house machines. The analyzers that Impromed currently integrates with are:

- Abaxis VetScan HMT Hematology

- Abaxis VetScan HMII (HM2) Hematology

- Abaxis VetScan HM5 Hematology

- Abaxis VetScan Classic Chemistry

- Abaxis VetScan VS2 Chemistry

- Abaxis VetScan VSPro Chemistry

- Alfa Wassermann ACE/VetACE/ACE Alera

- Drew Scientific HemaVet™ DMS / 850 / 950

- Hemagen Analyst III Chemistry

- Hemagen HC3 / HC5 Hematology

- AXIS-Q[1]

- Heska Data Capture Utility

  ◊ Heska CBC-DIFF Hematology System

  ◊ Heska DRI-CHEM 4000

  ◊ Heska DRI-CHEM 7000

  ◊ Heska Hematrue

  ◊ Heska VitalPath

- Horiba ABX Pentra 400

- Horiba Micros ES50 / ESV60

- IDEXX VetLab Station

  ◊ Catalyst Dx

  ◊ Coag Dx

  ◊ LaserCyte Hematology

  ◊ ProCyte Dx Hematology

  ◊ Snap Reader

  ◊ SNAPshot Dx

  ◊ VetAutoread Hematology

  ◊ VetLab UA

  ◊ VetLyte Electrolyte

  ◊ VetStat Electrolyte and Blood Gas

  ◊ VetTest Chemistry

- Nova Critcal Care Xpress (CCX)

- Oxford Science FORCYTE Hematology

- scil animal care/Vet Novations ABC

- scil animal care/Vet Novations ABC Plus

- scil animal care/Vet Novations SpotChem EZ

In order for your lab results to import from these machines, you must have the Lab Integrations Module. You will also need to have a computer workstation located near your blood machines.

When you are ready to begin using this feature, please call our Customer Support Center at (800) 925-7171 to have a technician help you with the configuration.

Once your Lab Machine/Computer connection is up and running, you will be able to import your lab reports into each patient's medical records. These values are charitable over time, allowing, for example, a glucose curve to easily be evaluated, or chronic renal failure in a feline to be tracked.

AXIS-Q is a software command center that links Impromed or Impromed Equine practice management systems with Abaxis, Heska, and scil diagnostic devices for true two-way communication and full integration.

The outside labs that you send your samples to may have the ability to interface with Impromed as well. Currently, the software interfaces with:

- Antech Diagnostics

- Antek LabDAQ

- IDEXX Reference Laboratory

- Phoenix Laboratories

- Schuyler House

If you are using another outside lab, please contact them and see if they wish to discuss becoming integrated with Impromed and Impromed Equine.

When working with outside labs, results will generally be on the laboratory's website or emailed into your business. The lab results will have to go into a particular folder on your server in order for Impromed to access them and pull them into the Impromed or Impromed Equine database.

To get assistance with this process, please call our Customer Support Center at (800) 925-7171 and a technician will help you with the configuration.

If you get results from a lab by fax or mail, scan the results and put them into the patient's medical record.

If scanning is not your preferred method, you will need to create forms that allow for you to type in the results for a patient. Creating these forms for lab results is part of Phase I's plan. You may also want to create forms that are acceptable by the lab for sample submission.

Now that you are scheduling everything electronically and have done some basic work setting up the laboratory results area, you are ready for Phase II.

Your Notes:

Phase 2

DO: Laboratory

At a Glance

1. Have labs approve submission forms.
2. Begin importing outside lab results.
3. Designate lab results leaders.
4. Begin importing results from in-house machines.

In Detail

It's time to put your lab machines to work! If you haven't already, please review your lab submission forms and get them OK'd by the lab you work with. By now, everyone should be familiar with your new submission process and begin using the forms.

Start importing results from the outside labs. You may want to continue receiving faxes for 2 to 4 weeks to verify that your lab results are importing correctly. Doing this often helps you and your staff to build trust in the new system.

Most veterinary businesses designate one or two people to be in charge of downloading and importing lab results, and following through on submitted samples. Since there will be no "pink sheet" as a physical reminder that a lab is pending, a notebook can be used as a reminder.

It may also help to have one person run the show - monitoring prelim, final, etc.

The results that don't import electronically can either be scanned in or typed into the form created during *"Phase 1" on page 12*.

Also, in-house laboratory machine results must now be imported into the patient's electronic record, instead of being printed and filed.

PLAN: Reminders, Take Homes, Educational Handouts

At a Glance

1. Choose a reminder process.
2. Choose a reminder interval.
3. Delegate leader for email reminders, if utilized.
4. Revise and update take home instructions.
5. Revise and update educational handouts you have made and/or brochures your business hands out.

In Detail

There are four common ways to send reminders:

- Mail (Postcard/Letter)
- Email
- Phone call
- Text messages

In this planning stage, you should be doing some research on programs, prices and effectiveness. You may want to poll your clientele and ask which format they prefer.

Impromed currently interfaces with VetPressOnline, Rapport, and many more.

VetPressOnline offers a full service, one stop solution for all your reminder card, business development and marketing. Small animal and equine reminder cards are a specialty, but you can also customize cards for a specialized mailing. VetPressOnline also offers targeted mailing lists, graphic design templates and expert marketing support.

Rapport is the only client communication solution developed and supported by Impromed with two-way integration with your Impromed software. It contains all the tools you need to achieve your goals - increasing staff efficiency, effectively marketing and growing your practice, and bringing more pet owners through your door while developing lasting relationships with clients. Rapport offers online scheduling, professional and mobile-friendly websites, automated text, email, voice messaging, postcards and marketing campaigns, mobile apps, and Pet ID Cards - all including pet images.

If you decide to try the email route, you need to assign a person to be in charge of this endeavor. This person will have to design a method to obtain email addresses from clients, maintain them and use them.

Another decision in regards to reminders is the interval between sending them. While most veterinary practices send reminders out on a monthly basis, studies have shown that reminders sent on a weekly basis are more effective for both clients and veterinary practices. Reasons for this include:

- Reminding the clients multiple times in a shorter time span makes it harder for them to forget to call and make an appointment.

- Reminders sent on a weekly basis reduce overloading the beginning of each month with phone calls and appointments – spreading these out throughout the weeks makes your workload more even.

For these reasons, you may want to consider sending reminders weekly or every other week.

Also within the planning portion of Phase 2 is the preparation and revision of information sent home with your clients. Most clinics have Take Home Instructions for post-surgery care and descriptions of follow-up care for special medical conditions. You will need to review these and create new ones as needed.

Educational handouts may include those that your business has designed personally, those taken from other veterinary clinics you have a relationship with, and LifeLearn. Review the handouts currently in your system and revise as needed.

Your Notes:

Phase 3

DO: Reminders, Take Homes, Educational Handouts

At a Glance

1. Implement new/revised reminder system.

2. Attach Take Home Instructions and other informational documents to appropriate products.

3. After two or three months, consider polling your clients to see if they like the new/revised reminder system. Make changes if needed.

In Detail

It's time to start reminding! By now you should have decided which style of reminders your business wants to use. If you have made a big change in your methodology, you may want to poll your clients who have received your new reminders after two to three months to see if they like the change.

Make adjustments as needed.

If you attach your documents and Take Home Messages to different portions of Impromed, it will increase the chances that your receptionist will give the information to your clients. This will help to increase client compliance through education and thoroughness.

You will need to go to **Setup > Products > Product Attachments** to attach your Take Home Instructions and Word Documents to products.

Once you attach your documents, you can configure the program when you want them to be printed (when added to invoice, when concluded, etc). By having your documents attached to the correct products, forgetfulness on part of doctors and receptionists to print documents will be eliminated.

As long as they hand them to the client, of course.

PLAN: Controlled Substance Log, Electronic Travel Sheets

At a Glance

1. Review drugs in the Product Spreadsheet. Check their category, if controlled, units, etc.

2. Research your state's requirements for electronic controlled substance logs; some require the log to be printed daily.

3. Modify mode of entry for controlled drugs to happen while invoicing to be able to accurately fill log.

4. Review Travel Sheet and revise.

In Detail

Let's talk about controlled drugs and travel sheets.

You will need to review your controlled drugs in inventory. Make sure they are all marked as controlled substances and are listed under the correct schedule. You can do this by clicking **Setup > Inventory > Inventory Items** – review the box **Controlled Substance Setting** for each item and make any adjustments needed.

You will need to find out if there are any specific requirements your state has in place for electronic controlled drug logs. Some states require a print-off for every day the clinic is open. Often, they also have specific informational needs – some will require a client and patient name only, while some will ask only for names and phone numbers, others will require addresses.

All of this information can be added or dropped from your controlled drug reports, as needed.

To view and/or print your logs, open the **Reports** Module, choose **Log Reports/Controlled Substance Log or Controlled Substance Log Export**. Click Print, choose a date range, and then set up the table to print all the information necessary to conform to government regulations. Clicking Save Defaults will save these settings. Once this is done, you can print or view your logs as needed.

Controlled drugs require one more step to be certain they are being recorded correctly.

Frequently, a charge associated with a surgery is "pre-medication" or "induction medication/injection," but a drug name is not listed except on the written medical record and the written controlled drug logs. In order for the computer to track controlled drugs accurately, you will have to begin entering the actual drug and amounts used for a surgery/procedure.

It may be helpful for you to create a bundle of various anesthetic medications that contain the controlled drugs your business uses. Since Impromed gives you the option to "opt-out" of using any portion of a bundle by un-checking it, a list of five possible anesthetics can become a list of two used anesthetics with a couple of clicks of the mouse.

Impromed can also request a reason for a drug being used for thoroughness of medical note-taking.

If you have any questions on how to set up controlled substances, or how to print or verify your reports, call Impromed Customer Support at (800) 925-7171.

Moving on to the Travel Sheets Module. If you have the electronic Travel Sheet Module, review any travel sheets already in your system and make adjustments as necessary. The travel sheets commonly contain the products you use on a daily basis, including medications and procedures, and finally lab requests.

Please note that you can have as many different kinds of sheets as you like. You can have all your surgery options on one sheet, for example, or break it up depending upon the type of surgery. Have one dental sheet for dogs, and another for cats.

The electronic travel sheets should replace the circle sheets you are currently printing. So, if you have multiple circle sheets, create them all. You can do this by going into **Setup > Travel Sheets**.

Your Notes:

Phase 4

DO: Controlled Substance Log, Electronic Travel Sheets

At a Glance

1. Consider running a paper log along with the electronic log for a month to compare the two.

2. Discrepancies in the paper vs. electronic log must be addressed and corrected.

3. Begin using electronic Travel Sheets.

In Detail

Your controlled drugs have been reviewed – all you have to do now is use the system you've already put in place. You may want to check the log at the end of each day to be sure it is correct by continuing to use a paper log for a month.

Just like the outside lab reports, this practice will increase your confidence and trust in the electronic controlled substance log. If there are major discrepancies, review how the drugs are entered into the record and invoice, and make sure they are marked correctly on the Inventory Items screen.

Using the Travel Sheets is just a matter of getting used to clicking instead of circling and help reduce missed lab charges.

PLAN: Security, Data Storage Service

At a Glance

1. Purchase any antiviral software.

2. Assign an employee to implement and enforce a backup schedule.

3. Finalize an Emergency Recovery plan.

4. Locate and hire a data storage facility.

5. Prepare to add software security measures.

In Detail

The security of your data was previously discussed in the Emergency Plan portion of this document. It should have been created before starting the paperless process. But if you have not done this, now is the time.

Use this plan as a reminder to research and purchase any needed antiviral software. Make sure it is installed and updated on a daily basis.

You will need to assign an employee to implement and enforce a backup schedule and verify the backup was successful. Finalize your Emergency Recovery plan so that in **"Phase 5" on page 24** you are ready for final implementation. You will need to locate and hire a data storage facility to provide off-site registered backups. You may wish to look into the **Covetrus online data backup**.

Your Notes:

Phase 5

DO: Security, Data Storage Service

At a Glance

1. Test your Emergency Recovery plan.

2. Backup employee should begin their schedule and enforce the plan.

3. Send data to a data storage facility.

4. Activate screen savers on in-room computers and enable passwords for screensaver logins.

5. Add software security measures.

In Detail

Finalize and test your Emergency Recovery plan by doing drills.

Your backup employee should begin their schedule and enforce the plan, especially if delegating responsibility to others. Begin sending your data to an off-site data storage facility.

Assuming you have a computer workstation in each exam room, you must protect your data from curious clients if they are ever left in an exam room alone. This can be achieved by changing the computer settings for the screen saver to activate after a short period of inactivity (30 seconds to 1 minute). Then, in order to use Impromed again, you need to log into Windows using a password. You can add even more security to Impromed with operators and limit what they can access. Operators can also lock Impromed to limit the access everyone has to the software by forcing passwords to be entered.

These solutions help to protect doctor-client-patient confidentiality.

PLAN: Estimates, Consents

At a Glance

1. Create Canned Estimates.

2. Review and create Consent Forms.

3. Acquire compatible devices to electronically collect signatures.

4. Begin using the Declined and Deferred sections of the system.

In Detail

Impromed is capable of storing Canned Estimates – general estimates for the most common surgeries, procedures and diagnostics performed in your clinic. Some common examples are:

- Spays and neuters

- Sedating and taking radiographs for OFA certification

- Dermatological work-ups.

Canned Estimates are designed by you and are simply assigned to a particular patient to generate an estimate.

To create a Canned Estimate, click on **Setup > Estimates > Canned Estimates > New**. You can then name your estimate accordingly and begin adding products as you would when generating an invoice.

Consent Forms can now be generated by your computer instead of the copy machine. Impromed come with a few Consent Forms pre-loaded into the system – however, these can be altered to suit your tastes. It is also possible to create forms from scratch. Consents are created in **Setup > Consent Forms > Estimate Consent Forms**.

Once your forms are configured to your specifications attach them to products which will save you search and click time. You can attach consents to products through **Setup > Products > Product Attachments**.

After attaching consents to products, when a Canned Estimate is transferred to a client, the consents previously attached will automatically be available for printing and/or signing. Consent forms can also be individually generated.

Your practice will have to make a decision on how you will be capturing consents. If you wish, you can print consent forms off and have the client sign the paper form. This form will need to be stored somehow – either in a general, alphabetized paper file or scanned into the computer and put into the patient's medical record.

You can bypass these steps by having at least one compatible signature capture device in the practice. A compatible signature capture device will allow you to capture signatures electronically and automatically store them in the patient's medical record.

Another aspect to estimate/consents is client compliance. Compliance can now be monitored by utilizing the Recommended, Declined and Deferred areas found in Patient Processing. Any estimate can be transferred to the appropriate area based on what the client decides to do once you have made a recommendation. You are able to transfer not only the estimate but the reason for the decline/defer as well.

Since you are just in the planning stages now, think about how you want to deal with Declined and Deferred products. Will you want to generate reminders for them? Or do you just want to keep them on record for future reference?

Your Notes:

Phase 6

DO: Estimates, Consents

At a Glance

1. Generate consents for anything over $50.

2. Move estimates to Declined and Deferred.

In Detail

You should be ready to capture signatures electronically or on paper using Consent Forms. Start getting your staff in the habit of generating Consent Forms for procedures, surgeries, etc. any time the products will total $50 or more.

All recommended procedures should now be moved to Accepted, Declined or Deferred, based on the client's decision.

PLAN: Time Clock, General Ledger/Reports

At a Glance

1. Set up employees and their schedules in Time Clock.

2. Choose accounting software (if you are not using accounting software already) and the reports you will be using from Impromed.

In Detail

Time Clock is a module that allows employees to clock in and out, and read and respond to messages posted by others. The Time Clock does not compute wages or paychecks; however, you can export the information to your accounting software for payroll management.

You must set up your employees and their schedules in Time Clock to be utilized. **Setup > Time Management > Time Management Employees** will allow you to get everyone into the system.

You are probably already utilizing some form of accounting software. Using this software in conjunction with Impromed alleviates a lot of double entry and is a big time-saver.

Impromed integrates with a variety of accounting packages. Please contact Impromed Support for a list of current packages Impromed integrates with. You will need to decide which software package works best for you and which reports you will be using to track information in Impromed.

Your Notes:

Phase 7

DO: Time Clock, General Ledgers/Reports

At a Glance

1. Begin using the Time Clock Module.

2. Begin exporting needed reports to your accounting software.

In Detail

It's time to start keeping track of time! Your employees should begin clocking in and out using the Time Clock Module. You may want to run your old system in conjunction with the new for a month or so for comfort's sake.

Once you have full confidence in the electronic version (meaning employee's remember to use the new system), eliminate your old time clock system. Begin exporting your needed reports to your accounting software and double-check that all reports are accurate and functioning correctly.

PLAN: Phone Messages, In-House Communications, Rolodex

At a Glance

1. Attach messages in Time Clock for in-house communication and possibly request a reply from employee.

2. Become familiar with the Message Center Module and use it for phone messages or other communication regarding clients/patients.

3. Add Rolodex information to Vendors.

4. Research Group Messaging options.

In Detail

There are two basic types of phone messages in a veterinary clinic: calls from clients and personal calls. Sometimes a call from a sales rep or other non-personal, non-client call comes in. You must plan how you will manage phone calls.

Emergencies are still best handled with a verbal message or handing the person a sticky note to be sure they get the message right away.

In-house messages can be created and attached to each employee's time card in Time Clock. You can also request a reply to be sure the employee has read the message that was generated.

The Message Center Module is the best way to record communications between clinic and client. The Message Center allows staff to enter messages targeted to specific groups (i.e. Doctors, Kennel Staff, etc.) that are client and patient specific. Any information entered into the Message Center will become part of a patient's permanent record, even if the message is deleted from the Message Center.

You will need to decide if the Message Center is an acceptable way for client calls to be communicated to the clinic.

Another suggestion is to create a resource in EasyTime titled "Phone Messages" for each employee that receives more than just the occasional message. Of course, this means that those people listed in EasyTime have to be responsible about checking for messages on a timely basis.

Impromed equates the word Rolodex with Vendors. Your list of vendors can be as long as you need it to be, no limits imposed. Many veterinary businesses will place everyone that was in their Rolodex into the Vendors list, including plumbers, cleaning services, etc. By placing your Rolodex in the Vendors list, it is available at any work station in the practice.

Even better, scratch outs, damaged cards, and bad handwriting will become moot points.

If your clinic decides to utilize Message Center or EasyTime for tracking messages, you will need to hold a training session for the entire staff in order to ensure future compliance.

Impromed provides a Group Chat feature. By using Group Chat, messages are sent throughout your business to allow instant communication directly through your software. Instant messaging is a form of communication which is usually done over the Internet, but Impromed has provided this text-based message system within your software. Instant messaging offers real-time direct written language based chat. There are many more options out there that are network-, or Internet-based chat features. Researching those options is something highly recommended if the Group Chat feature isn't ideal for your business.

Your Notes:

Phase 8

DO: Phone Messages, In-House Communications, Rolodex

At a Glance

1. Begin using the Message Center Module.

2. Populate your Vendors list with Rolodex information.

3. Post staff messages using Time Management.

4. Begin using your EasyTime "Phone Messages" resource.

5. Implement in-house chat.

In Detail

If you have decided to use the Message Center Module, begin entering calls for the doctors, etc. As with using EasyTime for messages, you may need a person to monitor this until everyone is comfortable with the change.

Populate your Vendors list with Rolodex information and post messages to staff using Time Management.

Begin placing all non-emergency phone messages in EasyTime for those resources that have been created. You may need to delegate a person to monitor this section and remind people to check it throughout the day, at least while people are getting used to it.

Implement your choice of in-house chat feature whether you decided to use Impromed or a third-party solution.

PLAN: Inventory

At a Glance

1. Clean up the list of products and double-check prices, packaging fees, etc.
2. Assess the products on your shelves and if you want to continue carrying them.
3. Pull inventory items with shorter expiration dates to the front of the shelves.
4. Set up and decide if you will use Max, Reorder and Safety Levels, and/or Reorder Quantity.
5. Update you Vendors list with current vendors you use.
6. Make sure your inventory manager is comfortable with software.

In Detail

A lot of your inventory management is probably paperless already, meaning your charges, purchase histories and vendors are kept on the computer.

To streamline your inventory into a more paperless system, a little housekeeping will be needed. Clean up your products/inventory lists by making new and/or deleting products, double-check packaging fees, prices, etc. Take a look at what is on your shelf and clean it all up by choosing which products you'd like to continue carrying, putting inventory items with shorter expiration dates in front (first-in, first-out), label shelves/products, if needed.

If you haven't already, get an accurate count of all your inventory items and make certain that your computer system is up to date – it's difficult to use a reorder list if your shelf says you have 10 cans of food and your computer says you have none.

You can decide upon and set maximum levels (largest amount you want on hand), Reorder levels (level at which you want to call vendor), safety levels (number slightly below reorder level to say the inventory is nearly depleted) and reorder quantity (number of items you want to reorder to prevent going over the maximum levels). Setting these items occurs in **Setup > Inventory > Inventory Items** under the **Locations** tab.

You can choose which of these items you would like to appear when invoicing by selecting from the options available under **Setup > Inventory > Inventory Options**.

Take the time to update your Vendors list with correct vendors.

Research additional options available to help maintain inventory easier. Streamline your workflow with your software, then add Intelligent Inventory to reduce costs, eliminate waste and increase practice revenue. Make inventory management fast and accurate with this cloud-based service. Manage pharmacy and supplies throughout your practice with the Cubex cloud-based tool. Cubex integrates with Impromed to rapidly provide accurate tracking, usage and dispensing. Your practice maintains control of medications, supplies, and controlled substances. Your patients have improved accuracy of medication dosage, managing expiration on medications, DEA compliance and overall efficiency.

Lastly, make sure your inventory manager is comfortable and knowledgeable on the system. Address any problems or concerns your inventory manager has. And, as always, address all questions to Impromed Support at (800) 925-7171. If they have several questions, they can arrange an appointment with a Support Technician to go over any concerns in detail.

Your Notes:

Phase 9

DO: Inventory

At a Glance

1. Take accurate inventory count and update your computer inventory quantities.

2. Begin using Purchase Orders and the Want List.

In Detail

Take an accurate inventory count of your products and update the computer database to reflect the same.

Begin using the Purchase Orders, which can be printed or emailed. Also, start using the receipt of stock portion of the Inventory Module, and otherwise entering all inventory information into the computer.

Make sure all people handling the products on the shelf understand first-in, first-out.

Implement the Want List to aid in reordering the items needed for your business to keep on hand. The Want List is a way to have Impromed tell what should be ordered based on the levels setup in your inventory items. Using the Maximum, Safety, and Reorder levels, as well as the Reorder quantity helps determine what needs to be ordered.

PLAN: Diagnostic Imaging

At a Glance

1. Decide if you will use digital radiology and learn how to capture images.

2. Set up the Diagnostic Imaging Log.

In Detail

Your business will need to make a decision if using DICOM Imaging is feasible at this time. If you are already digital, or are planning to become so, you will have to learn the specifics for your equipment and importing the images into Impromed or Impromed Equine. A call to the Customer Support Center at (800) 925-7171 to discuss this will probably be necessary.

Impromed currently works with a number of DICOM Imaging Providers.

Your Notes:

Phase 10

DO: Diagnostic Imaging

At a Glance

1. Begin using the Diagnostic Log.

2. Begin capturing digital radiographs and ultrasound/endoscopic images, as you are able.

In Detail

Begin using your on-line diagnostic imaging log. Be sure the transfer of images to medical records is happening accurately in whatever format you choose.

Begin capturing ultrasound/endoscopic images, if you are able.

PLAN: Medical Records

At a Glance

1. Review forms and templates; modify or create as needed.

2. Decide the clinic workflow.

3. Review VetNotes, Terms, and/or MacroText; make changes as needed.

4. Link products where appropriate.

5. Link Diagnosis Codes, if desired.

6. Designate a Medical Records leader.

In Detail

This will be the largest and most time-consuming phase in the going paperless process. So, let's begin!

Review all of your currently used forms and decide if more need to be created. All of the Medical Record print templates should also be reviewed and new ones created, if applicable.

Decide on the workflow of your business:

- Who enters information into medical records.

- When it will be entered.

- What information will be entered.

- Where it will be entered (into SOAP form/note, in the exam rooms or back hall).

- How it will be entered (into laptop, countertop computer).

Review VetNotes and make any applicable changes. This will most likely be an on-going process that grows and changes as the doctors and staff use it more and more. Right out of the box, VetNotes can make medical record entry easier, but you will want to customize the vaccines used, descriptions, etc. to your business style.

Terms allows operators to quickly insert pre-formatted medical text into a medical record object. Terms can be inserted into any object where notes can be entered, such as SOAP, Note, Surgery, Problem, etc. The purpose of Terms is to aid practitioners in fast, standardized medical record keeping with the flexibility of customizing information to fit your needs. By creating Terms in this manner, Impromed will help facilitate the use of electronic medical records.

You now have the ability to link products to different aspects of the medical record (VetNotes, Diagnosis Codes, MacroText, Terms, and Electronic Form Fields). Simply access **Setup > Products > Linked Products** to add these changes. In Create mode, you can add the same products to more than one VetNote at a time. This can be a big time-saving habit to make.

Medically driven invoicing will require input from doctors and staff.

Decide if you want to use Diagnosis Codes and if any linking will occur. You can link Diagnosis Codes to VetNotes and you can link products to Diagnosis Codes. Most businesses will use products plus VetNotes OR products plus Diagnosis Codes, but not both.

Lastly, assign one person to guide and oversee the implementation of paperless medical records. This go-to person should be able to answer any questions or address problems as they arise. Always remember to call the Impromed Customer Support Center at (800) 925-7171 if you have any questions or concerns with Medical Records in any way.

As stated before, this will probably be the longest phase of the paperless process. Give yourself extra time, if need be. And remember that nothing is set in stone – as your business grows and changes, your processes may change, too. And that's okay.

Your Notes:

Phase 11

DO: Medical Records

At a Glance

1. Put Medical Records into full use.

In Detail

At this point, you have already done a lot of work on paperless medical records to make them flow smoothly, and now it's time to put everything into motion.

At this juncture, you must decide how you will get old information into the new system. For instance – an existing client comes in for a yearly exam and vaccinations. Will you scan in their old paper record, or make a summary of the pet's vaccination status, health status and preventatives status, perhaps as a Medical Note?

Will you somehow mark this patient as having an existing paper record so that in the future, you do not waste time looking for a paper record that never existed?

There are a few different ways that you can accomplish this. One of the easiest ways is to add a database field to your system called Paper Records Entered, or something similar. Go to **Setup > Client and Patient**

Database > Patient Record Layout. Choose Create, make the field, and set the field as a Yes/No field, and place a check in it once all information from the paper record has been put into the system.

You will need to find a safe, dry location to store the paper records as they are incorporated into the computer. You will want this place to be away from the current filing system, so as to free up room as it is available. How long you keep the paper medical records is determined by your state's requirements. Most states require that you keep records for five to seven years.

Allow your staff an extra "phase" to implement paperless medical records. This is the largest change to your business and will take time.

Plan: Episodes of Care, Treatment Plans

At a Glance

1. Learn about and customize Episodes of Care.
2. Learn about and customize Treatment Plans to work for your practice.

In Detail

The Episodes of Care module provides a view of what is happening with a patient from the time they arrive at your practice until they leave. Episodes of Care keeps history of patient location (boarding / census), invoices, estimates, treatment plans, medical records, etc. for the defined date/time frame. This history is stored as an episode so operators can come back and see what was done for the patient and who saw the patient during that episode or case.

The Treatment Plan module is an important aspect of going paperless. Treatment Plans are a centralized, practice-wide view of all procedures that need to be performed for the patients currently in the hospital. The Treatment Plan lets operators enter tasks that need to be performed while a patient is in the practice. Product tasks, when completed, are moved to the invoice; activity and monitoring tasks when completed are stored as part of the patient's medical record. Treatment Plans create a virtual whiteboard that is accessible by every computer on the network in real-time.

Monitoring tasks generate medical record history and the tasks are recorded as a lab field associated with numeric or text fields. Once a monitoring task is completed, the medical record is created. Activity tasks such as, cleaning, feeding, watering, etc. are tasks staff need to track so they can verify they are completed. When a Product task is created, product(s) are selected and added to the Treatment Plan. When Product tasks are completed, the product associated with the task is added to the invoice.

All Treatment Plan tasks have comments and instance comments that can be added to the medical record as part of the object line. These can be helpful to maintain important information pertaining to the tasks performed. Implementing Canned Treatment Plans aids operators in implementing standards in for applying treatments.

Your Notes:

Do: Episodes of Care, Treatment Plans

At a Glance

1. Implement Episodes of Care and Treatment Plans.

In Detail

Begin by configuring Episodes of Care and making all lists necessary for the tasks to be completed and an episode to be closed. Make your canned checklists and adjust your settings to the desired options within **Setup > Episodes of Care**. These settings can allow for episodes to be started upon check-in to reduce the amount of steps your staff need to complete.

Treatment Plans will take more time to configure and more time to adjust your workflow. This is something you could start with some tasks and work towards adding more tasks as your staff becomes accustomed to using it. Start with the most common tasks that need to be completed. Then add more tasks as needed and even start adding Canned Treatments to make things easier once you have your tasks created.

Canned Treatment Plans allow different types of tasks to be grouped together and added at once for different types of procedures your practice uses. For example, a patient is in recovery needing their temperature, respiration, and pulse (TPR) to be checked every hour, then taken for a walk. Using Recovery Canned Treatment Plan with each of these tasks can make creating a patient's treatment plan quick and easy.

For more assistance configuring or using Episodes of Care or Treatment Plans, please use the help text within Impromed or contact Impromed Customer Support at (800) 925-7171.

Plan: Continuing Education, Software Updates

At a Glance

Covetrus is continually releasing updates to the latest versions of Impromed and Impromed Equine. We highly recommend keeping up-to-date with your software. Keeping your software updated provides your business the latest features to keep your practice growing with your clients. By maintaining Software Support with Covetrus, software upgrades are included (some terms and conditions may apply).

Final Phase

Take time to celebrate your success! Don't hesitate to contact the Impromed Customer Support Center at (800) 925-7171 if you have any questions or problems.

We are here to help you succeed.

Legalities

Many veterinarians and their staff are concerned about the legal complications of being a paperless business. Luckily, the human medical field has paved the way for being paperless and has ironed out a lot of the concerns.

Paperless medical records are now generally accepted in every state. You may want to contact your state veterinary board to double check if you have any concerns.

We will discuss many of the standard concerns in this section. Some of the following subjects were mentioned previously.

Record Retention

Every state has its own guidelines as to how long paper records need to be retained. The average is five years.

As you transition to being a paperless business, your records will need to be well maintained and easily accessible in case one is needed for legal reasons. However, do not store them in their "old" location – as each record is transferred into your computer, put the records in a new "holding" area.

Doing this will make it easy to tell, at a glance, how many of your records have been fully transferred into your Impromed software.

Client-Patient-Doctor Confidentiality

Client-Patient-Doctor (CPD) is easily maintained in a paperless environment. It is very easy for someone to open a drawer to pull a file or pick one up someone has left behind, even if you are not an employee. Once you are paperless, the average person will not take the initiative to figure out your computer system to look up records.

Please remember that any computers or laptops left in an exam room will be a temptation for clients to look at (or snoop). Be sure to set up your computer to go to a screen saver after a short period of non-activity. Also, make sure activating the computer is password protected. This may be cumbersome for your staff at first, but will be easily adapted with time and the benefits greatly outweigh the time it takes to type in a password.

Accountability

You will no longer be able to hold people accountable for their entry into a medical record based on their handwriting. To overcome this, you can make many parts of the medical records password protected. This may mean that only A, B and C can enter histories into records and Dr. D, E, and F are only allowed to enter in medical records. If these settings are password protected, Dr. D can't enter information under Dr. E's user.

Impromed also provides another helpful option in this area – the separation of the Provider employee and the Entry User employee. If one doctor performed a procedure, and their notes were entered by another member of the staff, the records can reflect this information.

Third Party Data Storage

It is very wise to locate a service to store your data. We wish it upon no one to be put up in front of a disciplinary board, but having your data stored elsewhere will only make your case more credible.

If a request is made to turn over medical records, print one off your computer and then give permission for the requesting agency to retrieve the information from the data storage facility. This will allow the powers that be to see the records have not been tampered with as they should be the same.

Revision History

Impromed is capable of providing a history of revisions, so that all changes to a medical record can be reviewed. This tool is better than any white-out, scratching over or erasing that can occur with paper records.

Your Notes:

Conclusion

Thank you for your interest in the Journey from Less Paper to Paperless. Please call Impromed at (800) 925-7171 if you have any questions or concerns. We are always here to help.

We have since updated this with the latest features Impromed offers and will continue as more features are added or changed. Please consider this guide as a continual work-in-progress.

What else would have helped you to go paperless? More explicit directions? Screenshots? A longer timeline? A shorter one? Any input you give us would be appreciated.

And, as we've stated before, if you have questions, concerns, or need help on your paperless journey, you can request assistance by contacting the Impromed Customer Support at (800) 925-7171 or visit **https://software.covetrus.com/support/impromed-support/**.

Appendix A: Going Paperless – A Step By Step

PHASE 1

Do: EasyTime/Boarding

1. Create Visit Reasons.
2. Link products to Visit Reasons.
3. Be sure doctors can schedule appointments from exam rooms.
4. If you provide boarding, contact your sales representative to purchase the Boarding Module.
5. Create Boarding Types.
6. Link products to Boarding Types.

Plan: Laboratory

1. If you don't have the Lab Integrations Module, contact your sales representative to purchase it.
2. Research your outside laboratories to find out if lab results can be downloaded into Impromed.
3. Create lab submission forms.
4. Create lab result forms for results that cannot be imported into Impromed.
5. Purchase a scanner for lab results that do not import or work for a specific form (history reports, etc).

PHASE 2

Do: Laboratory

1. Have labs approve submission forms.
2. Begin importing outside lab results.
3. Designate lab results leaders.
4. Begin importing results from in-house machines.

Plan: Reminders, Take Homes, Educational Handouts

1. Choose a reminder process.
2. Choose a reminder interval.

3. Delegate a leader for email reminders, if utilized.

4. Revise and update take home instructions.

5. Revise and update educational handouts you have made and/or brochures your practice hands out.

PHASE 3

Do: Reminders, Take Homes, Educational Handouts

1. Implement new/revised reminder system.

2. Attach Take Home Instructions and other informational documents to appropriate products.

3. After two or three months, consider polling your clients to see if they like the new/revised reminder system. Make changes as indicated.

Plan: Controlled Substance Log, Electronic Travel Sheet

1. Review drugs in the Product Spreadsheet. Check their category, if controlled, units, etc.

2. Research your state's requirements for electronic controlled substance logs; some require the log to be printed daily.

3. Modify the mode of entry for controlled drugs to be able to accurately fill log.

4. Review Travel Sheets and revise.

PHASE 4

Do: Controlled Substance Log, Electronic Travel Sheets

1. Consider running a paper log along with the electronic log for a month to compare the two.

2. Discrepancies in the paper vs. electronic log must be addressed and corrected.

3. Begin using electronic Travel Sheets.

Plan: Security, Data Storage Service

1. Purchase any antiviral software, etc. needed.

2. Assign an employee to implement and enforce a backup schedule.

3. Finalize Emergency Recovery plan.

4. Locate and hire a data storage facility.

5. Prepare to add software security measures.

PHASE 5

Do: Security, Data Storage Service

1. Test your Emergency Recovery plan.
2. Backup employee should begin their schedule and enforce the plan.
3. Send data to a data storage facility.
4. Activate screen savers on in-room computers and enable passwords for screensaver logins.
5. Add software security measures.

Plan: Estimates, Consents

1. Create your Canned Estimates.
2. Review and create Consent Forms.
3. Acquire compatible devices to electronically collect signatures.
4. Begin using the Declined and Deferred sections of the system.

PHASE 6

Do: Estimates, Consents

1. Generate consents for anything over $50.
2. Move estimates to Declined and Deferred.

Plan: Time Clock, General Ledger/Reports

1. Set up employees and their schedules in Time Clock.
2. Choose accounting software (if you are not using accounting software already) and the reports you will be using from Impromed.

PHASE 7

Do: Time Clock, General Ledger/Reports

1. Begin using the Time Clock Module.

2. Begin exporting needed reports to your accounting software.

Plan: Phone Messages, In-House Communications, Rolodex

1. Attach messages in Time Clock for in-house communication and possibly request a reply from employee.

2. Become familiar with the Message Center Module and decide if you will use or not.

3. Add Rolodex information to Vendors.

4. Use an EasyTime resource for "Phone Messages."

5. Research Group Messaging options.

PHASE 8

Do: Phone Messages, In-House Communications, Rolodex

1. Begin using the Message Center Module.

2. Populate your Vendors list with Rolodex information.

3. Post staff messages using Time Management.

4. Begin using your EasyTime "Phone Messages" resource.

5. Implement in-house chat.

Plan: Inventory

1. Clean up the list of products and double-check prices, packaging fees, etc.

2. Assess the products on your shelves and if you want to continue carrying them.

3. Pull inventory items with shorter expiration dates to the front of the shelves.

4. Set up and decide if you will use Max, Reorder and Safety Levels, and/or Reorder Quantity.

5. Update your Vendors list with current vendors you use.

6. Make sure your inventory manager is comfortable with software.

PHASE 9

Do: Inventory

1. Take accurate inventory count and update your computer inventory quantities.
2. Begin using Purchase Orders and the Want List.

Plan: Diagnostic Imaging

1. Decide if you will use digital radiology and learn how to capture images.
2. Set up the Diagnostic Imaging Log.

PHASE 10

Do: Diagnostic Imaging

1. Begin using the Diagnostic Log.
2. Begin capturing digital radiographs and ultrasound/endoscopic images, as you are able.

Plan: Medical Records

1. Create any forms not already utilized for medical records (i.e. anesthesia).
2. Make sure report card, referral templates in place (create if not).
3. Decide work flow: who enters info and when will it be entered, what info will be entered, where info will be entered (into SOAP form/note, in the exam room or back hall) and how will info be entered (into laptop, desktop computer).
4. Review and customize VetNotes or Terms then decide on your medical record format.
5. Drive invoices (link bundles, products, etc. to VetNotes).
6. Decide if/how will utilize Diagnosis Codes (link to VetNotes +/- link product to Diagnosis Code).
7. Generalized statement: will probably do products + VetNotes OR products + Diagnosis Codes, not both.
8. Assign person to oversee implementation and answer questions/address problems that arise.

PHASE 11

Do: Medical Records

1. Put Medical Records into full use.

2. Decide how to get old information into new system (scan, summarize).

3. Decide where to store paper records and for how long, depending on state laws.

4. Decide on notation to tell others if client has an existing paper record or not .

Plan: Episodes of Care, Treatment Plans

1. Learn about and customize Episodes of Care.

2. Learn about and customize Treatment Plans to work for your practice.

PHASE 12

Do: Episodes of Care, Treatment Plans

1. Implement Episodes of Care and Treatment Plans.

Plan: Continuing Education, Software Updates

1. Continue to review software features to determine if they will help your practice.

2. Find events, i.e. Webinars, Practice Builder Workshops, Veterinary Technology Summits, where your staff can expand their knowledge of Impromed or Impromed Equine.

FINAL PHASE

Don't hesitate to contact the Impromed Customer Support Center at (800) 925-7171 if you have any questions or problems. We are here to help you succeed.

Phase 1
- Action: EasyTime / Boarding
- Plan: Laboratory

Phase 2
- Action: Lab Results
- Plan: Reminders/Take Home Instructions/Educational Handouts

Phase 3
- Action: Reminders/Take Home Instructions/Educational Handouts
- Plan: Controlled Substance Log / Electronic Travel Sheets

Phase 4
- Action: Controlled Substance Log / Electronic Travel Sheets
- Plan: Security, Data Storage Service

Phase 5
- Action: Security, Data Storage Service
- Plan: Estimates, Consents

Phase 6
- Action: Estimates, Consents
- Plan: Time Clock, General Ledger / Reports

Phase 7
- Action: Time Clock, General Ledger / Reports
- Plan: Phone Messages, In-House Communications, Rolodex

Phase 8
- Action: Phone Messages, In-House Communications, Rolodex
- Plan: Inventory

Phase 9
- Action: Inventory
- Plan: Diagnostic Imaging

Phase 10
- Action: Diagnostic Imaging
- Plan: Medical Records

Phase 11
- Action: Medical Records
- Plan: Episodes of Care, Treatment Plans

Phase 12
- Action: Episodes of Care, Treatment Plans
- Plan: Continuing Education, Software Updates

CELEBRATE!

Appendix B: Disaster Recovery

Overview of the Disaster Recovery Plan

Hardware can be repaired. Software can be reloaded. But once your data is gone, it is impossible to recover. In order to prevent this from happening, it is imperative that you have a Disaster Recovery Plan.

The intent of a Disaster Recovery Plan is to have a written and tested plan for data retrieval in the event of an accident or natural disaster.

Your Installer, Educator or Technician has already put in place several key items to ensure your Impromed data remains safe. However, the continued integrity and safety of your data is your responsibility.

A single backup solution may provide you with a feeling of security, but no single backup type will allow you to recover from all four of the following disaster types:

- Failed Hard Drive

- Power Outage

- Fire

- Flood

Refer to the material in the **Disaster Recovery Guide** to assist you with the creation and implementation of your Disaster Recovery Plan. If you don't already have a copy of the guide, contact Impromed's Customer Support at 800.925.7171.

Place a copy of the **last page** of this guide – **"Disaster Recovery Plan Checklist"** - near your server and use it as a daily reminder to perform these important tasks.

⚠ **Reminder: Technology is in constant flux. If it has been more than two years since you last updated your backup system, contact your hardware provider to see if new, improved methods of backing up are available.**

This guide assumes that you use Impromed's EverSafe Backup Scheduling Software to schedule your Daily and Full System backups. If this is not the case, please contact your local hardware technician for full instructions on how to verify your backups.

Disaster Recovery Plan Checklist

Actions that will ensure your Impromed data can be accessed and restored in the event of disaster:

1. **DAILY**
    a. Check the EverSafe log.
    b. Print and file the Daily Financial Reports.
    c. Verify Replication (If applicable).

2. **WEEKLY**
    a. Check Scheduled Tasks.
    b. Open EverSafe and check the Full System Backup.
    c. Clean the keyboards and monitors.

3. **MONTHLY**
    a. Verify the iBackup (iBU) with Impromed or Impromed Equine Support Tools.
    b. Copy your data to an external drive and take it off site.
    c. Print and file the Monthly Financial Reports.

4. **QUARTERLY**
    a. Clean the workstations and server both internally and externally with compressed air.
    b. Run an error check (CHKDSK) on every computer and server.
    c. Restore and test your most recent Impromed or Impromed Equine data backup (iBU).