Chip Check:

Tips for Utilizing Your PIMS for Automatic Microchip Reminders

Microchip installed: Check. Registered: Check. Info updated regularly? Use your PIMS to get the job done.

Trends M*agazine* asked several software providers to lay out step-by-step instructions for using your PIMS to automatically remind clients to update their contact information in microchip registry databases. "Chip Check" (*Trends*, February 2022) sums up the tips. Here are the step-by-step instructions.

If your PIMS vendor didn't provide instructions, ask your IT consultant for help. And while you're at it, ask your PIMS vendor to provide the instructions to ben.williams@aaha.org so we can post them here.

NaVetor and Intravet

Answers provided by Mel Heinz, software product manager, Patterson Veterinary Supply with IntraVet instructions by Lisa Jones, product manager, Patterson Veterinary Supply.

There are three ways that practice management software can help automate the task of keeping microchip information registered and up to date for pet owners.

The first step is ensuring that microchip numbers are registered properly with the microchip databases, which is easy if there's an integration in place. For example, NaVetor cloud software from Patterson Veterinary integrates with both the Home Again and PetLink databases, so when the pet owner and patient first receive the microchip, veterinary staff members can register the patients' microchip numbers right from within NaVetor. When the microchips are registered, the information is sent directly to the databases.

Then, if a practice would like to make sure that microchips are checked at every annual visit, staff members can add that task to the exam template. In NaVetor, the physical exam area of the SOAP is templated and customizable, so a "check the chip" task can be added as a routine item during an exam. This would be most relevant during the annual checkup, so
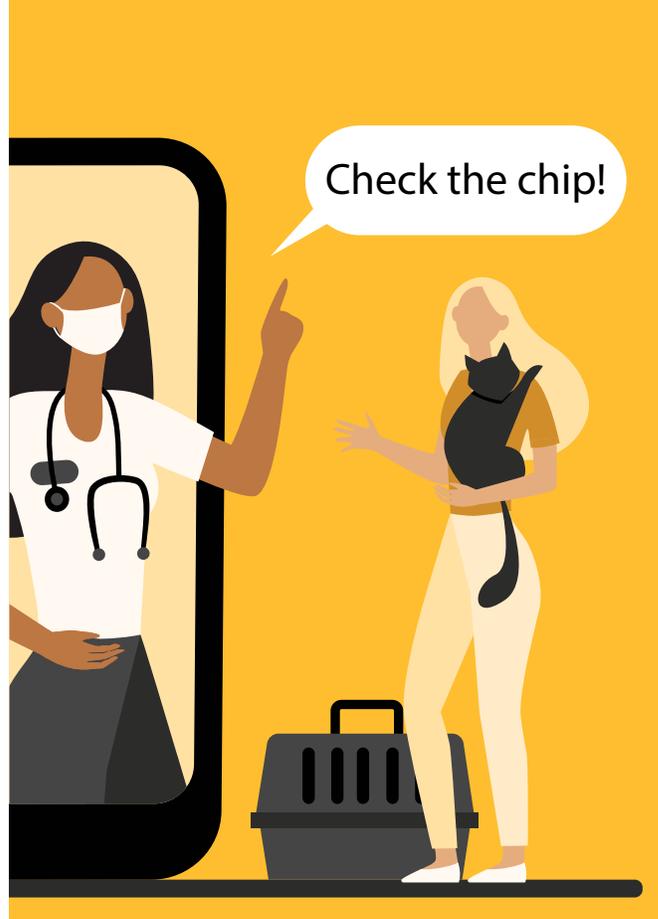
we suggest including that in a wellness exam or general annual exam template, whatever is used by the practice.

The same is true with IntraVet veterinary software. Visit templates can be configured to predetermine all aspects of a client visit. If a practice wanted to use an annual wellness visit to ensure the chip was readable and remind the pet parent to verify information with the chip registry, they could configure that within the template for the annual wellness exam. Then, to remind the pet parent to verify their information with the registries, the document section of the template setup will allow them to associate instructions for how to verify their information and the importance of making sure the information is always up to date. That associated document will print with the invoice or be added as an attachment to emailed invoices.

Third, setting up automated reminders for clients to review and update their microchip registration information is a great idea. Different software platforms handle reminders differently, but most platforms allow staff members to set automated reminders for certain annual events. NaVetor's reminders are triggered by recommended wellness events rather than appointments, so we recommend setting up an annual reminder for clients to review and update their microchip data. The timing can be once per year based on when the

microchip was first registered rather than after an annual exam. (That way, if the client misses an annual exam, the microchip reminder will still be sent.) Clients can check and update their microchip information via their patient portal, and that information is then automatically sent to the microchip databases.

Neo

1. Create a form explaining the benefits of microchipping and keeping your information up to date.

2. Create a product for "Microchip Scanned" or some other appropriate description.

3. Link the form through Special Actions to the new microchip product.

4. Update applicable procedure templates.

    a. Add "Scan Microchip" to the Notes tab. Could add a check box or place for tech to initial who completed the task.

    b. Add product to Lines tab.

5. Scan for the microchip while you have the consultation open. The microchip ID will display in the patient quick list at the top of the page if there is one recorded for the patient.

Cornerstone

Create a "Check the Microchip" protocol with Cornerstone to ensure your key patient visits include a microchip verification/suggestion. Similar to your existing "microchip implant" item, a "scanned for chip" code will display the existing microchip ID, can be used to verify ID entered correctly, and add a note to the client on their invoice or create a separate print out document with microchip registration contact details.

1. Create a client notification using either

    a. a departing instruction to remind clients to register/update their contact information with the microchip registration service(s) you use (Lists > Departing Instructions), or

    b. a print only document with information and importance of keeping the information up to date

2. Create a service item to add to your visit invoices, and/or preventive care, new pet, routine elective procedure group codes such as spay, neuter, dental. (Lists > Invoice Item)

    c. Use an appropriate description that will appear on the invoice such as "Microchip scanned and read"

    d. Assign to same classification as your microchip implant item for consistency

    e. Attach the departing instruction (if using)

    f. Set special action for **Update Microchip ID** to *immediately on invoice/PVL*

    g. Set special action for **Print Document** to *Print after invoice is posted* (if using a document)

3. Add service item to preventive care, new patient and elective procedure visit groups (List > Invoice Item)

4. Add service item to visit and procedure templates if not using group codes

5. Add action item to exam templates to scan for a chip (especially if sharing the note to client via email or print after the visit)

ezyVet

1. Set up a standard of care (event group for M/CHIP)

2. Create a zero-dollar product that could fulfill the task once completed

3. Create a Picklist template to be used with this specific appointment type that includes the zero value product as a billing trigger (so it would automatically fulfil the SOC)

4. Then create an automatic communication (email) after the appointment reminding the client to update the registration details if required.

ezyVet plus VetRadar

Split the process in two.

1. You can have a task on each template in VetRadar to check the microchip which the tech can sign off.

2. You can then have an automated communication task in ezyVet to send the customer a reminder to update contact info in registry.

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