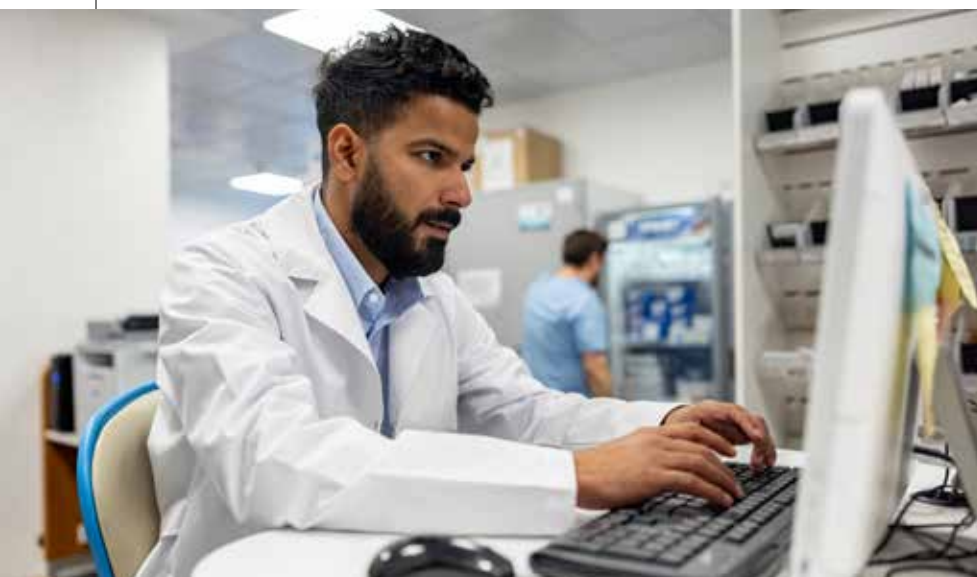


INNOVATION STATION

Help Wanted: AI Administrative Assistant

Artificial intelligence is transforming veterinary practices by handling repetitive administrative work.

BY ANGELA BEAL, DVM



Imagine having an administrative assistant who follows you throughout the day, handling the repetitive, time-consuming tasks that slow you down. No one enjoys working through a stack of prescription refill requests or digging through years of medical records before an appointment, and time spent on these tedious tasks could be better spent on patient care.

That assistant may be more attainable than you realize — in the form of artificial intelligence.

By now, you've probably heard countless promises about what AI can do. While some of the hype is justified — and some might not be — one of AI's most practical strengths is helping veterinary teams reduce administrative workload, streamline workflows, and reclaim valuable time. Even if you're hesitant to embrace AI, using it for administrative tasks is a low-risk way to explore its potential.

Here are eight practical — and perhaps unexpected — ways AI can help lighten your administrative load and give you more time to focus on your patients and clients.

1 Summarize Previous Visits

Walking into an exam room prepared is critical, but searching through medical records can eat up valuable time between appointments. AI-powered medical summaries can pull out key information before you step through the door. Instead of manually skimming months or years of visit notes, AI can summarize relevant history, current medications, previous testing results, and overdue preventive care. Then you can review the summary and walk into the exam room confident you're up to speed.

2 Prevent Missed Revenue

Missed charges account for a significant loss for many veterinary practices, but AI can help close the gap between revenue earned and money collected.

As AI becomes more tightly integrated with practice information management systems, it can compare medical records, treatment plans, and invoices to flag services or medications that were documented but not billed. Staff can then review the suggested discrepancies before finalizing the invoice.

3 Track Client Compliance

To focus your client education efforts where they are most needed,

Regular audits ensure your records are up to date and accurate, but who wants to double-check every line against patient records?

you first need to know where compliance is falling short. AI can analyze practice data to uncover trends that might otherwise go unnoticed. For example, you could ask:

- Which preventive care recommendations have the lowest acceptance rates?
- Which clients are most likely to delay or decline treatment estimates?
- Which clients haven't refilled chronic medications or parasite preventives?
- Which services are most commonly declined?

These insights can help your team prioritize outreach and personalize client education before small gaps become larger health problems.

4 Prepare Pet Insurance Claims

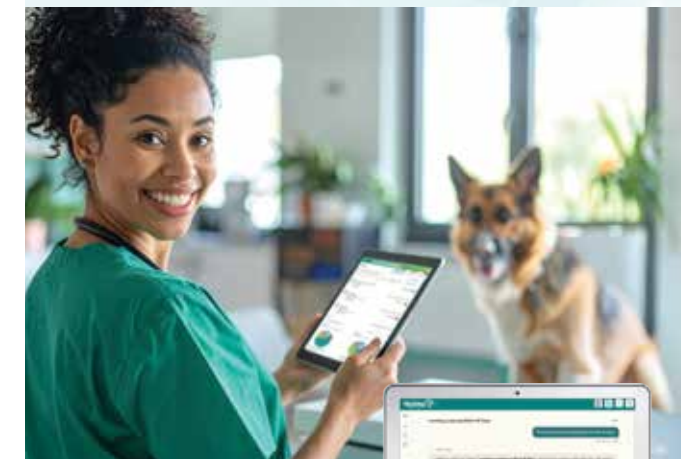
Increased pet insurance adoption can lead to better care, but it can also mean a larger administrative burden for veterinary teams. Manually completing claims forms and gathering relevant documentation can eat up valuable time. For example, a claim for an orthopedic condition may require records from the initial lameness visit, X-rays, surgery, and follow-up appointments. Instead of having a team member hunt through the medical record, AI can quickly compile these documents and write a concise summary.

5 Handle Online Pharmacy Requests

Many practices battle an endless stream of medication refill requests. AI can compare the request against a patient's medical record to determine if they have been examined recently, the medication has been previously prescribed, and the requested dose is consistent with past prescriptions. It can also check whether monitoring tests, such as a thyroid panel or phenobarbital level, need to be run before the refill can be approved.

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AI can then compile the requests for quick review, and even present them in order of urgency rather than chronologically. For example, prescriptions for critical medications such as insulin and anticonvulsants can be prioritized over requests for flea and tick medications.

If a refill can't be approved immediately, AI can draft a message explaining why. For example: "Bella is overdue for her annual exam, so we can't authorize additional medication refills. Please contact us to schedule an appointment so she doesn't miss a dose."

6 Complete Regulatory Paperwork

AI can streamline regulatory paperwork by reducing manual data entry, checking for completeness, and drafting documents from information already in the medical record. Here are some specific examples:

- **Rabies certificates:** AI can pull patient details from the medical record to complete rabies certificates that you can quickly review and sign.
- **Health certificates:** Similarly, domestic and international health certificates can be drafted based on the pet's medical history, vaccinations, diagnostics, and travel destination.
- **Travel documentation:** AI can quickly summarize country-specific requirements (e.g., rabies titers, vaccination requirements, timing windows) so your team can ensure compliance.
- **Practice certifications:** AI can alert staff to upcoming certification expirations, such as DEA registration, state license renewal, or Fear Free certification.



▲
DR. ANGELA BEAL is a full-time writer for the veterinary industry and the owner and CEO of Rumpus Writing and Editing, a veterinary copywriting company. She lives in Columbus, Ohio, with her husband, two sons, and their two Chihuahuas. Contact her at rumpuswriting.com.

AI ADMINS

► Practice management software:

PIMS providers are increasingly incorporating AI. Some platforms can summarize a patient's medical history, compile information for insurance claims, or even submit a claim directly from an invoice. Most provide business analytics, pulling important metrics so practice leaders don't have to run manual reports.

- **Scribes:** In addition to generating medical notes, some AI scribes can summarize medical records and check for missed charges before checkout.
- **Large language models:** ChatGPT, Claude, and others can be used to draft rabies certificates and travel documents before veterinary review. Be sure to remove identifiable information from medical records before uploading them into an LLM.



7 Reconcile Controlled Substance Logs

Tracking controlled drug use is one of the most important regulatory tasks your team tackles. Regular audits ensure your records are up to date and accurate, but who wants to double-check every line against patient records? Instead of assigning this time-consuming job to a busy team member, have AI cross-check your books with recent invoices and medical records to flag discrepancies that warrant a closer look. That way, you'll be confident should the DEA show up for an unexpected audit.

8 Analyze Practice Data

Most practices have valuable information sitting inside their PIMS that rarely gets used. AI can analyze the data in seconds to reveal trends that would otherwise require time-consuming manual reporting. For example, AI can:

- Forecast demand by predicting busy seasons based on appointment volume
- Identify which appointment types take more time, potentially uncovering workflow inefficiencies
- Identify commonalities between lapsed clients to help you proactively improve retention
- Determine which appointment types generate the most — and least — revenue
- Identify which appointment types experience the highest no-show rates

Once you know where barriers to productivity, compliance, and retention lie, you can create a plan to address them.

AI will never eliminate the need for skilled veterinary professionals, but it can eliminate countless administrative interruptions that fragment the workday. In the end, AI's greatest contribution to veterinary practice may simply be giving teams more time to do the work only they can do. **TMB**