VETERINARY CLINICS · CLINICAL DOCUMENTATION OPERATIONS

Patient medical records management

Automatically creates, updates, and manages patient medical records throughout a veterinary visit, ensuring accurate documentation and seamless information flow between staff members.

01 WORKFLOW TRIGGER

Pet patient is checked in for appointment at front desk

BLUEPRINT OVERVIEW

What this workflow accomplishes

This workflow links AVImark, PetDesk, eVetPractice, Vetspire, Cornerstone, and Shepherd so a patient's medical record is built from check-in through record distribution without staff retyping history, vaccine dates, or treatment codes. Automation handles retrieval, template generation, field validation, cross-system sync, and client delivery. The attending veterinarian owns every clinical finding, diagnosis code, and prescription order, and the practice manager owns what leaves the clinic.

01

OUTPUTS

Signed digital record with treatment plan, Client visit summary and instructions, Prescription orders queued for pharmacy, Billing codes ready for invoicing, Referring vet update where applicable

02

SUCCESS MEASURES

Record completion rate per visit, Documentation accuracy score, Visit end to record finalization time, Percent records signed same day

03

CORE SYSTEMS

AVImark, PetDesk, eVetPractice, Vetspire, Cornerstone, Shepherd

HOW TO USE THIS BLUEPRINT

Practice managers: walk the seven stages against your current paper and PIMS handoffs, and mark where your team still double-enters data.

Veterinarians and technicians: confirm the template routing at stage three matches how you actually triage wellness, urgent, and complex cases.

Implementation teams: build stage six last, and only after billing code mapping between AVImark, Cornerstone, and Shepherd has been reconciled.

THE WORKFLOW

End-to-end stage map

Seven stages carry a patient from front desk check-in to a signed and archived record. The decision point at stage three governs which documentation template and care protocol the visit runs on.

01 TRIGGER

Patient check-in detected

Detect check-in and pull patient and appointment data

AVImark · PetDesk

02 ACTION

Retrieve existing medical history

Load history, medications, and vaccine records into template

AVImark · eVetPractice

03 DECISION

Determine visit complexity level

Classify visit complexity and route documentation protocol

Vetspire · eVetPractice

ROUTINE WELLNESS | URGENT CARE | COMPLEX MEDICAL CASE

04 ACTION

Generate examination template

Build customized exam form and send to veterinarian

Vetspire · AVImark

05 ACTION

Process completed examination data

Capture findings, diagnoses, treatment plans, and prescriptions

eVetPractice · Cornerstone

06 ACTION

Update integrated systems

Sync record, follow-ups, prescriptions, and billing codes

AVImark · Cornerstone · Shepherd

07 OUTPUT

Distribute finalized records

Send summary to owner, referrer, and compliance archive

PetDesk · eVetPractice

LEGEND TRIGGER ACTION DECISION OUTPUT

IMPLEMENTATION DETAIL

Stage-by-stage breakdown

Each stage states the operational intent, the human control point, and the systems likely to take part. System names are examples, not a required architecture.

01 TRIGGER

Patient check-in detected

System detects when a pet patient is checked in for their scheduled appointment. Patient information and appointment details are automatically retrieved from the practice management system.

CONTROL POINT

Front desk staff confirm the correct patient and owner are matched before the chart opens, since multi-pet households and similar names cause the most misfiled records.

SYSTEMS AVImark PetDesk

02 ACTION

Retrieve existing medical history

System pulls complete medical history, previous visit notes, current medications, and vaccination records. Pre-populates examination template with relevant baseline information.

CONTROL POINT

The receiving technician verifies current medications and vaccine status against the owner's report and corrects the chart before the veterinarian sees it.

SYSTEMS AVImark eVetPractice

03 DECISION

Determine visit complexity level

System analyzes appointment type, presenting symptoms, and patient history to classify as routine wellness, urgent care, or complex medical case. Routes to appropriate documentation template and care protocols.

CONTROL POINT

The attending veterinarian or lead technician can reclassify any visit at triage, and any reclassification is logged with the reason.

SYSTEMS Vetspire eVetPractice

04 ACTION

Generate examination template

Creates customized examination form based on visit type with pre-filled patient data, relevant assessment sections, and diagnostic checklists. Sends template to veterinarian's device for completion.

CONTROL POINT

The veterinarian may add or remove assessment sections on the generated form; no pre-filled finding is treated as examined until it is confirmed.

SYSTEMS Vetspire AVImark

COMPLETION AND MEASUREMENT

Closing stages and results

The final two stages push the finished record into billing, pharmacy, and the client portal while preserving an auditable version of what the veterinarian actually signed.

05 ACTION

Process completed examination data

Captures veterinarian's examination findings, diagnosis codes, treatment plans, and prescription orders. Validates required fields and formats data according to medical record standards.

CONTROL POINT

The veterinarian signs the record; validation flags for missing weight, dose, or diagnosis code go back to that veterinarian, never to support staff.

SYSTEMS eVetPractice Cornerstone

06 ACTION

Update integrated systems

Automatically updates patient record across all clinic systems, schedules follow-up appointments if needed, and generates prescription orders. Syncs billing codes and treatment information for invoice processing.

CONTROL POINT

The practice manager reviews the billing code queue and the pharmacy team confirms every prescription order before it is filled or dispensed.

SYSTEMS AVImark Cornerstone Shepherd

07 OUTPUT

Distribute finalized records

Sends completed medical summary to pet owner via client portal, updates referring veterinarian if applicable, and archives records in compliance database. Generates any required follow-up care reminders.

CONTROL POINT

Client-facing summaries hold for veterinarian or manager release when the case involves euthanasia, poor prognosis, or a pending referral.

SYSTEMS PetDesk eVetPractice

DELIVERABLES

- Signed digital record with treatment plan
- Client visit summary and instructions
- Prescription orders queued for pharmacy
- Billing codes ready for invoicing
- Referring vet update where applicable

KEY METRICS

- Record completion rate per visit
- Documentation accuracy score
- Visit end to record finalization time
- Percent records signed same day

IMPLEMENTATION CHECKS

- Role based access to patient charts
- Controlled substance log permissions
- Veterinarian e-signature before record lock
- State record retention schedule
- Audit trail on every chart edit

NEXT STEP

Turn this blueprint into an implementation plan.

Map each stage to your own systems, permissions, and approval routing before selecting tools or building automation.

packfoundry.app/assessment

VETERINARY CLINICS WORKFLOW PACKS AND A FREE ASSESSMENT