

# CLIENT CARE RESPONSIBILITIES

**NUMBER ONE RESPONSIBILITY IS CREATING A THOROUGH AND KIND CLIENT EXPERIENCE!**

- COMMUNICATION
  - Answer calls and respond voicemails (*in a timely and kind manner*)
  - Reply to emails (*in a timely and kind manner*)
  - Callbacks (*wellness and negative fecal tests if pet was not sick*)
  - Prescription Pick Up Management
  - Vet2Pet -Appt Requests, Chat Response and Logging, Visit Tracker Status Updates and Client Response
- SCHEDULING
  - Scheduling Appointments
- RECORD-KEEPING
  - Enter into charts the client documents, prior records, referral updates

If there is only 1 client care person, prioritize tasks in the following order

- Check forms email and upload to patient record
- Check voicemail
- Check email for URGENT items, then non-urgent
- Check Vet2Pet for URGENT appt. requests and chats, then non-urgent
- Daily huddle
- Monitor Vet2Pet visit tracker
- Primary phone role
- Move up later appointments to fill holes in next day & current day's schedule
- Fill openings for current and following day
- Forward book wellness appts.
- Callbacks (done via text message in Vet2Pet) - DO SICK BEFORE 11 am
- Check whiteboards & email 3 times/day
- Appointment confirmation calls
- End of shift

Client Care, Person A	Client Care, Person B
<p><b>Main Responsibilities</b></p> <ul style="list-style-type: none"> <li>● Check forms email and upload to patient record</li> <li>● Monitor Vet2Pet chats &amp; appointment/cancel requests</li> <li>● Daily huddles</li> <li>● Check whiteboards &amp; email 3 times/day</li> <li>● Monitor Vet2Pet visit tracker</li> <li>● Fill openings for current and following day</li> <li>● Forward book wellness appts.</li> <li>● End of shift</li> </ul>	<p><b>Main Responsibilities</b></p> <ul style="list-style-type: none"> <li>● Check voicemail</li> <li>● Monitor HPVC email</li> <li>● Primary phone role</li> <li>● Check whiteboards &amp; email 3 times/day</li> <li>● Move up later appointments to fill holes in next day &amp; current day's schedule</li> <li>● Callbacks (done via text message in Vet2Pet)</li> <li>● Appointment confirmation calls</li> </ul>

**AM Tasks**

- Count cash drawer
- Monitor Vet2Pet Tracker-take care of clients arriving for appts, med pick up, etc
- Vet2Pet Chat & Appointment/Cancel Requests
  - Prioritize based on urgency
  - In eVet enter comm log for all communications
  - For cancellations follow steps to remove from schedule, comm log, apply fee if needed & contact to reschedule
- Forward book wellness appointments
- Assist Client Care, Person B when needed

**AM Tasks**

- Listen/write down phone messages
  - Prioritize based on urgency
  - In eVet enter comm log for all communications, including voicemails
- Check Forms email and upload to patient records-make note of any we are missing
- Run AM Huddle
- Check HPVVC email
  - Prioritize based on urgency
  - In eVet enter comm log for all communications
  - For cancellations follow steps to remove from schedule, comm log, apply fee if needed, & contact to reschedule
- Fill open appointments for current day if needed
  - For illness/urgent appts contact client via Vet2Pet or phone
    - Do not hold appointments for clients if owners do not respond, go to the next client
    - Collect deposit, process in eVet, add to schedule
    - **First**, existing clients with medical concerns
    - **Second**, new clients, If open urgent and illness appointments are not filled by current clients contact new clients from tracker
    - **Third**, scheduled medical concern appointments that may want to come sooner
    - **NOTE:** Recommend SHORES if the pet needs care sooner than we can schedule.
  - For open 30 minute appts
    - Contact client via Vet2Pet or phone - do not leave messages
    - Call clients that are scheduled at the end of the day to see if they can come earlier
  - For any questions see CEC or PM

**MID DAY**

- Monitor Vet2Pet Tracker-take care of clients arriving for appts, med pick up, etc
- Vet2Pet Chat & Appointment/Cancel Requests
  - Prioritize based on urgency
  - In eVet enter comm log for all communications

**MID DAY**

- Ensure any emailed ER/Specialist Reports are uploaded and proven process is followed
- Check Forms email and upload to patient records-make note of any we are missing
- Complete callbacks via Vet2Pet text message using template in proven process

HEALING PAWS VETERINARY CARE

Reviewed 6/22

<ul style="list-style-type: none"> <li>○ For cancellations follow steps to remove from schedule, comm log, apply fee if needed &amp; contact to reschedule</li> <li>● Make sure checklist is complete for AM and afternoon</li> <li>● Assist Client Care, Person B when needed</li> </ul>	<ul style="list-style-type: none"> <li>● Notify clients that prescriptions are ready for pickup by Vet2Pet, phone call or email.</li> <li>● Run afternoon huddle</li> </ul>
<p><b>PM Tasks</b></p> <ul style="list-style-type: none"> <li>● Follow up with nurses for any urgent client needs</li> <li>● Monitor Vet2Pet Tracker-take care of clients arriving for appts, med pick up, etc</li> <li>● Vet2Pet Chat &amp; Appointment/Cancel Requests             <ul style="list-style-type: none"> <li>○ Prioritize based on urgency</li> <li>○ In eVet enter comm log for all communications</li> <li>○ For cancellations follow steps to remove from schedule, comm log, apply fee if needed &amp; contact to reschedule</li> </ul> </li> <li>● Forward book wellness appointments</li> <li>● Assist Client Care, Person B when needed</li> <li>● Ask how you can help others complete tasks ONLY when yours are finished</li> </ul>	<p><b>PM Tasks</b></p> <ul style="list-style-type: none"> <li>● Complete confirmation calls</li> <li>● Enter new clients             <ul style="list-style-type: none"> <li>○ Call for records</li> <li>○ Send welcome email offering 2 dates, reserve appointments on schedule</li> <li>○ Update new client tracking list</li> </ul> </li> <li>● Follow up with nurses for any urgent client needs</li> <li>● Check next day for open appts - see above for scheduling process</li> <li>● Complete PM checklist tasks</li> <li>● Ask how you can help others complete tasks ONLY when yours are finished</li> </ul>

Notes:

- If there are open appointments in the current or following week and you have reached out to all new clients, notify Jess or Kathy.
- Tasks can be interchanged between Client Care Persons if one or the other is not busy.
- Documents you should have handy:
  - 2021 Appointment Types
  - 2021 Phone Scripts, Tips, and Tribal Knowledge
  - 2021 MASTER Elective Surgery Estimate and Scheduling Process
  - 2021 Deposit and Cancellation Fees
  - 2021 MASTER New Client Application Proven Process
  - 2021 MASTER Prescription Pickup and Payment Process
  - 2021 MASTER Referral/ER Report Proven Process
  - 2021 MASTER End of Shift Proven Process
  - 2021 MASTER Thyroid, ACTH stim and Low Dose Dex Testing