

Communication S.O.P.

Purpose: To have the most consistent communication through the appropriate means.

Objectives: To have a good working system in place to communicate with team members and clients

Platforms and use:

NOTE: Any work related communications (other than shift changes) should be read and responded to only while on the clock - unless salaried level management duty in specific employee's job description.

Task Dashboard To-Dos in eVet created from Patient/Client Communication Log Entries

Who: employees, doctors, clients, virtual call center

What: Used for client/patient specific tasks that need completed. These tasks and the task assignment are completed using the eVet "Create task entry" Checkbox when making a communication entry in the client/patient medical record. When entering a communication entry, be sure to enter your initials so if the person assigned has questions they know who to talk to.

If you enter an updated note and reassign to another employee the entry must have the communicators' initials and date. Each updated note for a task must be able to be communicated in 4 sentences or less or it should be a verbal conversation/email. A task should never be more than 3 interactions/initials/date stamps or that indicates the client should have an appointment/consult or the employees should discuss verbally.

When: employees must have responded to all of their tasks on the task dashboard within 24 business hours (that the employee is scheduled). Tasks being dealt with that need more time (i.e. to-do list tasks) should be removed from the task dashboard within 24 hrs and placed on employee's personal to-do list to be completed in a timely manner.

Task Dashboard To-Dos in eVet created by an Employee that didn't involve a client communication log

Who: employees, doctors, clients, virtual call center

What: Used for internal communication specific tasks that need completed. These task assignments are completed using the eVet Add Task functionality. When adding a task to communicate with another employee, enter the task, patient (if it pertains to a patient), select "0" days, your initials and a date so if the person assigned has questions they know who to talk to..

If you enter an updated note and reassign to another employee the entry must have the communicators' initials and date. Each updated note for a task must be able to be communicated in 4 sentences or less or it should be a verbal conversation/email. A task should never be more than 3 interactions/initials/date stamps or that indicates you should discuss verbally with the employee.

When: employees must have responded to all of their tasks on the task dashboard within 24 business hours (that the employee is scheduled). Tasks being dealt with that need more time (i.e. to-do list tasks) should be removed from the task dashboard within 24 hrs and placed on employee's personal to-do list to be done in a timely manner.

Email (employee@carlisleveterinarian.com and healingpaws@carlisleveterinarian.com):

Who: employees, doctors, clients, virtual call center

What:

- client communication to healingpaws@carlisleveterinarian.com and individual nurse emails
- all communication from leadership team to employees
- employee questions for leadership team that do not relate to specific clients or patients
- representative communication
- newly released training materials, workplace documents and videos will be sent to staff via individual work emails

When:

- Individual email (and healing paws or virtual care email if your job duty) should be checked 3 times during your shift (Morning, Afternoon, and Evening before you leave)
- Client emails must be responded to within 4 business hours of entering the inbox.
- All leadership team emails must be responded to in order to show received within one business day of you working from when they were sent.
- Email is never to be used to communicate with clients on days the clinic is closed with the following exception: Dr has notified client that they will be emailing labwork results so that client has them in case of heading to ER on the weekend. Dr is emailing client information and specifically notates in the email that the clinic is closed until X day and emails will not be monitored until then.

What If: If your email has not been responded to within 48 business hrs, repeat send and verbally/over the phone contact the receiver

Notification Policy: emails are not to be checked or responded to unless employee is on the clock or their salaried job description includes home email monitoring

Special Note: Clients are not to be given a doctor's email unless the doctor chooses to give that email to the clients themselves.

Text

Who: employees, doctors, clients, virtual call center

What:

- Primary method of alerting direct supervisor if you are sick/not able to come to work or will be tardy. (see handout for further details). You must also submit an absence form: <https://forms.gle/sUyhgrgfcwYexZu6>
- Not to be used for questions to management team that are not in regards to work call-off
- Sharing work photos if they will not send via email from your device
- Group bonding and important information text chat

When:

- Call-off texts should be, if at all possible, greater than 2 hours prior to shift. Call-off texts received later than 1 hour prior to shift may not be considered for excused absences/tardies.
- Between 8 am and 8 pm, inspirational texts or fun, work appropriate photos may be shared amongst this group chat. Please be considerate of appointment hours and try not to send these texts during appointment shifts.
- Emergency/urgent information will be sent via group text.
- Please remember to have your phone on silent/do not disturb during appointment shifts.

What If: If a client does not respond to the text sent within 4 business hours, follow up with an email.

Notification Policy: texting between employees, acquaintances and friends are not to be done during work hours. Phones should be on do not disturb or airplane mode while working.

Special Note: Texts sent to the leadership team in regards to things other than call-off will not be responded to. These must be sent in email format and, unless emergent, will be responded to by the leadership team during office hours.

Vet2Pet

Who: employees, doctors, clients, virtual call center

What:

- Personalized client communication through Vet2Pet chat, automated reminders through eVet and Vet2Pet
- Appointment requests and scheduling
- Prescription requests
- Client submitted pet selfies
- Patient Reminders and Check-In Forms sent to owners
- Client Group Notifications
- Sending invoices and receiving secure credit card payments

When:

- Chat with clients from Vet2Pet app during clinic open hours only
- Invoices sent during clinic open hours only
- Prescription and appointment requests should be dealt with on the same time expectations as website prescription and appointment requests

What If: If a client does not respond to the chat sent within 4 business hours, follow up with a phone call. If the client does not respond to the virtual invoice within 5 minutes for appointments and 1 hour for invoices outside of appointment then client care is to call for payment

Special Note: If a doctor finds it absolutely necessary to contact a client outside of business hours, Vet2Pet chat is the only pre-approved method to contact this client. If the client is not a Vet2Pet user, permission by the medical director must be received prior to contacting the client and the medical director may not be contacted on their time off for this permission - you must think ahead and ask prior to their time off. When contacting a client during off hours via Vet2Pet, the doctor must include “the clinic is closed and won’t open again until Xday” and also must sign off with “if Y occurs with a patient please contact SHORES urgent care center. I will return to the clinic Xday”. If any labwork was done, this PDF can be sent in this Vet2Pet chat. When the doctor has signed off with “I will return to the clinic Xday” then they MUST press END chat and copy the text into the patient's comm log.

Calls

Who: employees, doctors, clients, virtual call center

What:

- Client communication through clinic specific phone numbers.
- You may use your personal phone ONLY if utilizing the 3CX app as it goes through the clinic number.
- Clients are not to be called from personal numbers and personal numbers are not to be given to clients (this includes doctors and groomers).
- Secondary method of alerting direct supervisor if you are sick/not able to come on work or will be tardy.
- If there is no leadership team in the building and you have a QAS level 5 question/emergency(response needed within 15 mins) you are able to call the practice manager with questions.

When:

- During office hours.
- Clients are not to be called by doctors before 8 am or after 8 pm and are only to be called on days the clinic is open. The only exception is if permission is given by the medical director (Dr. Sands).
- Staff may return client calls between 7:30 am and 6 pm.
- In regards to call-off texts not being responded to within 30 minutes call your supervisor. If they do not respond to that call, text the next supervisor in your chain.

What If: If a client does not respond to the voice mail left within 48 hours, call again AND send a follow up email.

Notification Policy: If family members have to reach you for an emergency - they are to call the clinic, not your personal cell phone. You may call them back on your personal cell phone for privacy but must alert team supervisor that you need the break. Phones should be on do not disturb or airplane mode while working.

Special Note: Doctors are not to be called during their off time in regards to their patient UNLESS they have not left medical records complete as to what to do for the patient's care.

Paper/Memos - Specifically used for purchase orders, special orders, and implementing new SOPs or policies for everyone to sign off on. Paper messages are not used.

Zoom - For telecommunicating to meetings or with clients. When using Zoom with clients, the display name must either be "Healing Paws Veterinary Care" or "Fluffy's appointment" and must have the HPVC logo as the image. When participating in Zoom - dress must be professional, no profane language, and children should be kept out of the room. If participating in a Zoom meeting from home, scrubs are not required, logo wear not required but dress should be neat and non-offensive.

Website Portal - For training protocols, business documents and policies, proven processes, and training videos. Only uploaded by the management team, access provided to all employees.

Google Drive - You are to create documents in your personal work google accounts not in the healingpaws@carlisleveterinarian.com google drive. Google drive of healingpaws@carlisleveterinarian.com is ONLY to be used for calculation worksheets which must be copied before use and then storage of patient worksheets created by those copies.

When To Work - Used to publish employee work schedules. This is the avenue for time-off requests. Time-off requests must be submitted both via paper request in the time-off box and electronically through when to work before they will be considered.

