

Confirmation Calls Process

Purpose: A courtesy call providing client with important appointment information

Objectives: To have an organized system in place so we can deliver consistent appointment points

Time frame: Calls must be made the business day prior to the appointment

Oversight Responsibility: Client Care Specialist, Client & Pet Liaison

Performance Responsibility: Senior Client Care Specialist

Preparation Steps

Print the eVet Appointment Report

- Report name - Enter the date for which you are confirming calls
- Start and End Date - Enter the date for which you are confirming calls
- All other fields default to the selected data needed for the report

Tracking on the Appointment Report

As we receive emails that the client has confirmed and upload forms do the following

- When the client confirms via app - write a C
- When we receive the pre-visit form - write an F
- Does the pet require PVP's - highlight this appointment, they will require a call

Making The Calls

- If PVP's are required the client MUST be called
 - Verify requirements and instructions with a nurse
 - Make sure they have purchased the required medications with the last 12 months
 - Make sure they do not need a refill
 - Go over instructions with the client
 - Mark confirmed or left message in Vet2Pet & comm log
- If the client has not confirmed via Vet2Pet
 - Mark confirmed or left message in Vet2Pet
- If we have not received the previsit form
- For Monday appts contact any pets that need PVP's Thursday AM. Calls for others will be made on Saturday by an approved team member.

*** SCRIPT "Good morning/afternoon, this is Jess calling from Healing Paws Veterinary Care. Thank you so much for confirming Fluffy's appointment through our app. There are just two other things I want to cover with you. First, did you receive your electronic form to fill out with Fluffy's information for her visit? Great, I will need you to submit that before you come tomorrow. Will you send that in for me tonight so that I can get it in her chart please?. Great! The other thing is I wanted to see if you have any questions about giving Fluffy her pre-visit medication prior to her visit. She will need x and y tonight and then x and y tomorrow, about 3 hours before her visit. Do you have any questions about giving those? Thanks for your time today, I will keep my eye out for Fluffy's form and we look forward to seeing you and Fluffy tomorrow at 10:00 AM." IF MAKING CALLS FOR THE FOLLOWING MONDAY ADD - "We are closed for the weekend, if you have any questions, we will be back in the office on Mon. at 8am."*

- If you are unable to reach the client or leave a message at any of the numbers listed send a text message and comm log

***SCRIPT "Hi, this is Jess from Healing Paws. We look forward to seeing you and Fluffy at her appointment tomorrow, 1/1 at 10:00 am. Please be sure to give her pre-visit medications prior to her appointment. She will need x and y tonight and then x and y tomorrow, about 3 hours before her visit. Please complete her pre-visit form this evening so that I can get it in her chart. PLet me know if you have any questions."*

Canceling/Rescheduling

If the owner asks to reschedule and it is less than 24 hrs, please advise of rescheduling fee and ask if they would like to keep their current appt. If they are rescheduling because of illness, COVID exposure or family emergency let them know we will waive the rescheduling fee, you just have to get a manager to do that for you. Make sure that all of this is clearly comm logged and whiteboarded to the Client Experience Coordinator