

## ELECTIVE SURGERY SPAY AND NEUTER ESTIMATE AND SCHEDULING PROCESS

### NOTE:

- surgery appts are not scheduled in eVet until process below is followed
- pets under 12 months of age (when owner calls to schedule) must be current on their vaccinations and had at least one wellness visit with a HPVC dr in their lifetime
- pets over 12 months of age:
  - If they had a wellness visit with a dr in the last 3 months can schedule as a CVT anesthesia prep visit
  - If it has been more than 3 months since a dr was seen for a well visit must schedule dr well visit instead of CVT appt (see notes below)

### "Surgery Scheduling Checklist for Pet Owners"

<https://carlisleveterinarian.com/surgery/>

### Surgery Scheduling Checklist for HPVC Team Members

- 1) Click the blue check box **Treatment Plan and Estimate** and select **ADD**
- 2) **In Reason for Treatment Plan Estimate**  
Write: "Castration Complete Package With Reward" or "Spay Complete Package With Reward"-  
*note - we do not offer the reward to clients who have no-showed, declined recommended vaccinations, or are altering their pet after 18 months of age, for these clients, skip the "With Reward" part*  
Press the blue button **SAVE!!!!** as this is the only way to save the reason
- 3) **QUICK ADD THE FOLLOWING CODES IN THIS ORDER**
  - a) [estanesprepcan2021](#) or [estanesprepfel2021](#) (this is the anesthesia prep visit)
  - b) [ESTcastrationcanine2021](#) or [ESTcastrationfeline2021](#)  
[ESTspaycanine2021](#) or [ESTspayfeline2021](#)
  - c) *If patient is known to be over 75 lbs enter the code [:largebreed](#)*
  - d) [9139](#) (This is the Healthy Lifestyle Reward-only add if <18 months old and compliant.)
  - e) [chipest](#) (This is the microchip for estimates that will not require a # to be entered)  
*If pet is known to be microchipped, do not enter chipest code please!*
- 4) **Click on the description [Microchip with with Temp Reader, 1 Year Membership and Lifetime Registration](#)**
  - a) Minimum Quantity - enter 0    Maximum Quantity - enter 1
  - b) Leave Quantity (each) as 1
  - c) Press Save
- 5) **Enter Your Nurse Treatment Code (this should be nurse and your initials i.e. nursejl)**
- 6) Select **blue word choice "Email"** next to Treatment Plan Estimate
- 7) From the **email template** drop down choose **Anesthetic Treatment Plan** -Press **Send**

- 8) Put on *your* task list the patient's name and "check if owner has questions and would like to leave deposit and schedule" for 3 days after you sent the estimate
- a) Pets Over 12 Months Who Have Had a Dr Well Visit in the last 3 months and All Established Pets under 12 months
    - i) CVT Anesthesia Prep appt within 5-14 days of procedure
    - ii) Admission Time - enter procedure in the reason for visit
    - iii) Discharge Time
  - b) Pets Over 12 Months It Has Been MORE THAN 3 MONTHS SINCE THEY SAW A DR
    - i) DR concierge wellness visit within 4 weeks of procedure
    - ii) Admission Time - enter procedure in the reason for visit
    - iii) Discharge Time
  - c) *If owner declines scheduling* send this info and why to Kathy Charette to add to our surgery feedback spreadsheet

