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Glossary and Information:

Definitions:

- **Active Clients:** Have been seen at the hospital in the last 6-14 months.
- **Lapsed Clients:** Were last seen at the hospital 14-23 months ago.
- **PetDesk:**
 - Automatically sends reminders to clients for services due or overdue. Reminders are tied to what hospitals have in Pulse for each patient
 - It is critical teams ensure reminders are up to date & tied to services for CCP and non-CCP clients in pulse
 - Exam- Annual, vaccines, 4Dx/HWT, fecal, dental cleaning, preventative labwork, chronic medication labwork)
 - Teams should follow up with a phone call if clients are coming due or overdue for services (run reminder report(s))

Reminder about CCP Services

- When you sign-up a new CCP, create a Callback for 6 months to confirm that CCP services have been used/scheduled. If they have unused services, call the client and get them scheduled!
- If you don't set up the callback, the client may miss out on using services from their plan, as there won't be an automatic reminder linked to them.

What reminder reports should I be running in pulse?

- UPCOMING: 10-12 months since last visit
- OVERDUE: 13-23 months since last visit

How Often should I be running these reports?

- Weekly

Why am I running an upcoming reminder report and not waiting until patient is overdue?

- We want to get the annual booked before they become an overdue/lapsed client
- Gives teams time to review what the patient is due for so we align services (get everything done in 1 appointment like their annual wellness exam, vaccines, and lab work)

Why do I need to call and email clients who are upcoming or overdue for services if Petdesk is already contacting them?

- A direct call from the hospital is the best call to action for clients to book their next visit & re-establish/establish the client/hospital bond

What other information should I obtain when I speak to the client on the phone or at their appointment? Confirm the following information is up to date in Pulse and in the right field:

If you do not have correct information in Pulse, PetDesk will not be able to send reminders to the client!

- First **and** secondary client on the account
- Mailing address
- Email
- Phone number
 - Should be labeled as a cell phone instead of a home phone
 - Label with which owner it's for if there are more than 1 on the account
- Confirm all information is correct and in the correct field
- Remove all alerts that are not necessary after updating (IE needing a new email address because an email bounced)

Forward Booking:

To reduce client's falling into the 'overdue' reminders category, try to capture clients at the time of check-out for what they could be due for – boosters, Wellness Plan services, labwork, etc.

Scheduling the follow-up visit:

- During the check-out process, schedule the patient's next appointment
 - Vaccine booster
 - Spay/neuter/dental
 - Recheck ears, eyes, skin
 - Available Care Companion Plan Services

Example Script:

Team Member: "Thanks for bringing Fluffy in today! We do need to see him back in 4 weeks for a booster vaccine. I can get you on the schedule Friday the 15th at 9am."

Owner states: "I do not know my schedule today, I will call back and schedule."

Team Member: "Let's get you scheduled so that spot is held for you. When you receive your reminder, if it doesn't work for you we can reschedule at that time."

- If the client does not book at the time of check out, create a Callback to reach out to the client and get the appointment scheduled.

"It looks like Fluffy is on our Dental Wellness Plan. Let's get you scheduled for that! Does Thursday the 27th work for you?"

"Because Fluffy is on a chronic medication, we need to make sure we keep his annual lab work up to date. He's due for that in March so let's get you scheduled now so that doesn't get missed!"

Reminders Clean Up

With coding updates, this is the time to clean up your patients reminders. There may be duplicate reminders on the pet's file that would be confusing for both the client and the staff.

Delete all duplicate reminders prior to reaching out about the patients reminders.

Reminders - View Reminders Create Reminder	
Description	Reminder Due
⚠ Annual Labwork 	11/1/2022
⚠ Annual Heartworm Test	11/1/2022
⚠ Leptospirosis Vaccine (1 Year)	11/16/2022
⚠ Flea Treatment	5/27/2023
⚠ Fecal	7/10/2024
Annual Blood Work 	10/10/2025
Annual Exam	10/10/2025
Bordetella Vaccine	10/10/2025
Rabies Vaccine	10/23/2026
Canine Distemper Vaccine (DAPPi)	10/10/2027

Using the example above, the patient has a duplicate reminder for Annual Blood Work (labeled as Annual Labwork from 11/1/2022 and Annual Blood Work from 10/10/2025). Before notifying the client, you need to delete the original Annual Labwork reminder from 11/1/2022.

1. Select View Reminders

Reminders - View Reminders Create Reminder	
Description	Reminder Due
⚠ Annual Labwork	11/1/2022
⚠ Annual Heartworm Test	11/1/2022

2. Open up 'Overdue Reminders' and delete the duplicate reminder.

Overdue Reminders (5)							
Edit	Type	Description	Employee	Patient	Start Date	Due Date	Delete
	Wellness	Annual Labwork	Kai	Kai	10/1/2022	11/1/2022	
	Wellness	Annual Heartworm Test	Kai	Kai	10/1/2022	11/1/2022	
	Wellness	Leptospirosis Vaccine (1 Year)	Kai	Kai	10/16/2022	11/16/2022	
	Wellness	Flea Treatment	Kai	Kai	5/25/2023	5/27/2023	
	General	Fecal	Kai	Kai	6/10/2024	7/10/2024	

If your reminders do not properly override past reminders, contact Michanne Sealund (Michanne.sealund@wellhaven.com). She will work with you to fix this issue.

Running Active Patient Reminder Report in Pulse:

Active Clients: Have been seen at the hospital in the last 6-14 months. This report is pulling services that are **upcoming** and we are trying to get them scheduled before they are overdue.

The team members should be looking at all services due (upcoming and overdue) **AND CCP services due**. They will need to go to the Wellness Plan screen to review what CCP services they still have available before their plan renews. These services should be booked in one single visit. This is necessary for the **alignment of services** mentioned above!

1. On left side of the screen, select **Reports**
2. Select the pencil button next to **Patient Reminders Report**
 - a. If you do not see that in your list of reports, at the top of the screen select **Create**
 - b. Name the report **Patient Reminders**
 - c. At the Type dropdown, select **Patient Reminders**
 - d. **Save**
3. Select **New Run**
4. Under **Report Run Name**, name it something that gives you a quick reference on what the report will be showing. Example: Reminders due March 2025.
5. In **Reminder Information**: remember this is upcoming not overdue. You are pulling 10-12 months since last visit
 - a. **Start Date**: Put the first day of the month that you want the reminders to start on
 - b. **End Date**: Put the last day of the month you want the reminders to end on
(**Example**: if you are running a report on January 1, 2025 and want to pull reminders due in 2 months, you would put your start date as March 1, 2025 and end date as March 31, 2025).
 - c. **Types**: Select Wellness and General
 - d. **Species**: Select all
6. **Generate**
7. Repeat these steps to create a report for reminders due 3 months and 4 months from the date you are running the report.

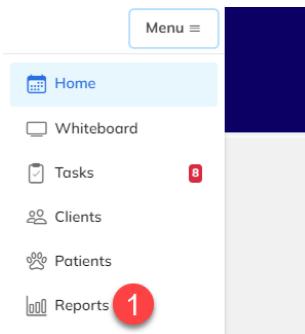
After printing out the reports, distribute the pages to the team (not just reception – everyone plays a part in retaining clients!) and give them a timeline of completion.

Running Active Patient Reminder Report in Pulse (Visual Aid):

Active Clients: Have been seen at the hospital in the last 6-14 months. This report is pulling services that are **upcoming** and we are trying to get them scheduled before they are overdue.

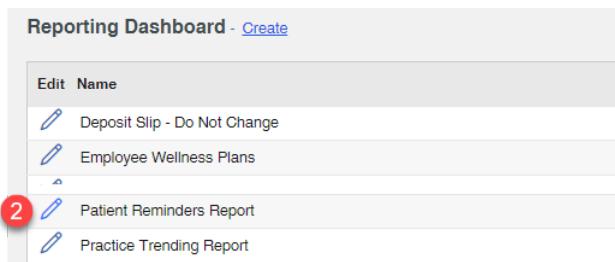
The team members should be looking at all services due (upcoming and overdue) **AND CCP services due**. They will need to go to the Wellness Plan screen to review what CCP services they still have available before their plan renews. These services should be booked in one single visit. This is necessary for the **alignment of services** mentioned above!

1. On left side of the screen, select **Reports**



2. Select the pencil button next to **Patient Reminders Report**

- If you do not see that in your list of reports, at the top of the screen select **Create**
- Name the report **Patient Reminders**
- At the Type dropdown, select **Patient Reminders**
- Save**



3. Select **New Run**

Patient Reminders Report - [Back to List](#)

Report Information

Name *

Description

Type * 3

Save **New Run** **Schedule Run**

4. Under **Report Run Name**, name it something that gives you a quick reference on what the report will be showing. Example: Reminders due March 2025.
5. In **Reminder Information**:
 - a. **Start Date**: Put the first day of the month that you want the reminders to start on
 - b. **End Date**: Put the last day of the month you want the reminders to end on
(Example: if you are running a report on January 1, 2025 and want to pull reminders due in 2 months, you would put your start date as March 1, 2025 and end date as March 31, 2025).
 - c. **Types**: Select Wellness and General
 - d. **Species**: Select all
6. **Generate**

Client Reminders SOP

Patient Reminders Report - [Back to Report](#)

General

Report Run Name * Reminders for March 2025 4

Reminder Information

Start date 03/01/2025 5 A

End date 03/31/2025 5 B

Number of Days past Start 29 ?

Types General, Wellness 5 C

Employee -- Select Employee(s) ?

Client Information

Classification -- Select Classification(s) ?

Inactive Classifications -- Select Inactive Classification(s) ?

Client Status -- Select Client Status(es) ?

Sort by Client Name ?

Beginning value ?

Ending value ?

Communication Filter No Filter ?

Options

Patient Information

Species 19 selected 5 D

Clicking generate will only produce the list in display form.
You will then be able to process distribution after reviewing the list and testing.

Generate 6

7. Repeat these steps to create a report for reminders due 3 months and 4 months from the date you are running the report.

Running Lapsed Patient Reminder Report in Pulse:

Lapsed Clients: Were last seen at the hospital 14-23 months ago. This report will pull **past due** services.

The team members should be looking at all services due – both overdue and upcoming. While this report is pulling past due services, the patient may have active reminders still in place (example: the pet is overdue for a leptospirosis vaccine but still has an active distemper vaccine). You should be **aligning services** and booking services into one single visit.

Running Patient Reminder Report in Pulse:

1. On left side of the screen, select **Reports**

2. Select the pencil button next to **Patient Reminders Report**
3. Select **New Run**
4. Under **Report Run Name**, name it something that gives you a quick reference on what the report will be showing. Example: Reminders due June 2024.
5. In **Reminder Information**:
 - a. **Start Date**: Put the first day of the month that you want the reminders to start on
 - b. **End Date**: Put the last day of the month you want the reminders to end on
(Example: if you are running a report on January 1, 2025 and want to pull past due reminders from 6 months ago, you would put your start date as June 1, 2024 and end date as June 30, 2024).
 - c. **Types**: Select Wellness and General
 - d. **Species**: Select all
6. **Generate**
7. Repeat these steps to create a report for reminders that were due 13 – 23 months prior.
 - a. Pull in 2 month increments so Pulse does not freeze due to size of report.

After printing out the reports, distribute the pages to the team (not just reception – everyone plays a part in retaining clients!) and give them a timeline of completion.

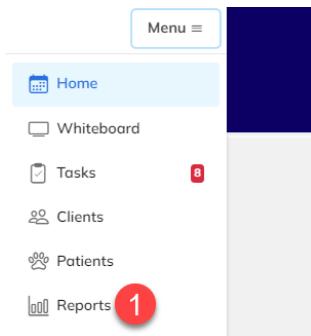
Running Lapsed Patient Reminder Report in Pulse (Visual Aid):

Lapsed Clients: Were last seen at the hospital 14-23 months ago. This report will pull **past due** services.

The team members should be looking at all services due – both overdue and upcoming. While this report is pulling past due services, the patient may have active reminders still in place (example: the pet is overdue for a leptospirosis vaccine but still has an active distemper vaccine). You should be **aligning services** and booking services into one single visit.

Running Patient Reminder Report in Pulse:

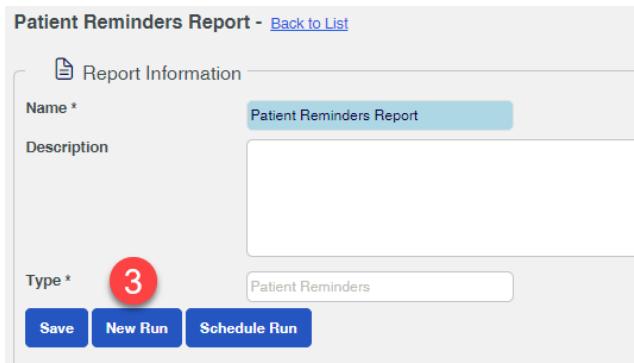
1. On left side of the screen, select **Reports**



2. Select the pencil button next to **Patient Reminders Report**



3. Select **New Run**



4. Under **Report Run Name**, name it something that gives you a quick reference on what the report will be showing. Example: Reminders due June 2024.

5. In **Reminder Information**:

- Start Date:** Put the first day of the month that you want the reminders to start on
- End Date:** Put the last day of the month you want the reminders to end on
(**Example:** if you are running a report on January 1, 2025 and want to pull past due reminders from 6 months ago, you would put your start date as June 1, 2024 and end date as June 30, 2024).
- Types:** Select Wellness and General
- Species:** Select all

6. **Generate**

Client Reminders SOP

Patient Reminders Report - [Back to Report](#)

General

Report Run Name * Reminders due June 2024 4

Reminder Information

Start date 06/01/2024 5 A

End date 06/30/2024 5 B

Number of Days past Start 29

Types General, Wellness 5 C

Employee -- Select Employee(s) --

Client Information

Classification -- Select Classification(s) -- ?

Inactive Classifications -- Select Inactive Classification(s) -- ?

Client Status -- Select Client Status(es) --

Sort by Client Name ?

Beginning value

Ending value

Communication Filter No Filter ?

Options

Patient Information

Species 19 selected 5 D

Clicking generate will only produce the list in display form.
You will then be able to process distribution after reviewing the list and testing.

Generate 6

7. Repeat these steps to create a report for reminders that were due 13 – 23 months prior.
 - a. Pull in 2 month increments so Pulse does not freeze due to size of report.

After printing out the reports, distribute the pages to the team (not just reception – everyone plays a part in retaining clients!) and give them a timeline of completion.

What to do with the Report:

1. The reports are pulled in Pulse and distributed to the staff.
2. Staff members pull up the patient information and review what reminders are upcoming, overdue, and what Wellness Plan services they have available on **all** pets the owner has on their account.

Client Reminders SOP

Using the example below, with the patient being due for their fecal and rabies vaccine in February and DAPPi + Leptospirosis and exam in March, we need to be recommending the client comes in for their annual exam, update all vaccines that are due, pick up flea/tick/heartworm prevention, and brings a fresh fecal sample all in one visit.

Reminders - View Reminders Create Reminder	
Description	Reminder Due
<input checked="" type="checkbox"/> Credelio Flea/Tick Prevention	4/1/2024
<input checked="" type="checkbox"/> Interceptor Heartworm Prevention	4/1/2024
<input type="checkbox"/> Fecal	2/12/2025
<input type="checkbox"/> Rabies Vaccine	2/12/2025
<input type="checkbox"/> Annual Exam	3/4/2025
<input type="checkbox"/> Canine Distemper Vaccine (DAPPi)	3/4/2025
<input type="checkbox"/> Leptospirosis Vaccine	3/4/2025

3. Staff members call the client and notify the owner what the patient(s) is due for. Acknowledges the importance of updating theses vaccines in a timely manner and offers a day/time to get them scheduled.

Example Script: *"Hi Stacy! This is Emily from WellHaven. It looks like Fluffy is coming up due for his annual exam, annual fecal, rabies vaccine and DAPPi + Leptospirosis, and flea prevention. We want to make sure that gets done soon so I can get you schedule with something that works well for you now! How does Monday February 2nd at 11am sound?"*

Great! Glad we got that scheduled. While I have you on the phone, I wanted to confirm we have your up to date information in our system. Can we confirm the following – (client name on the file/email address/mailing address/phone number)."

4. Call is documented in the pet's medical record showing we reached out for their reminders and if it was/wasn't scheduled.
5. If the owner doesn't answer or asks to schedule later, the employee sends an email from Pulse using the 'Services Due'
6. After sending the email, create a Callback for 2 weeks later to do a follow-up phone call.
7. If the client notifies you that they are going to another vet hospital now, deactivate the client.

Example of email template used in Pulse:

This template will be uploaded to your Pulse. The employee needs to put an X next to the services that are due.



Hi %clientname%,

We wanted to make you aware that %patientname% is due for services. It's important to schedule their visit soon to help ensure their health and well-being.

You can now book an appointment online through [Vetstoria](#) here: **CLICK HERE**. We look forward to seeing you and %patientname% soon!

Thank you,

%practicename%

%practiceaddress%

%practicephone%

%practiceemail%