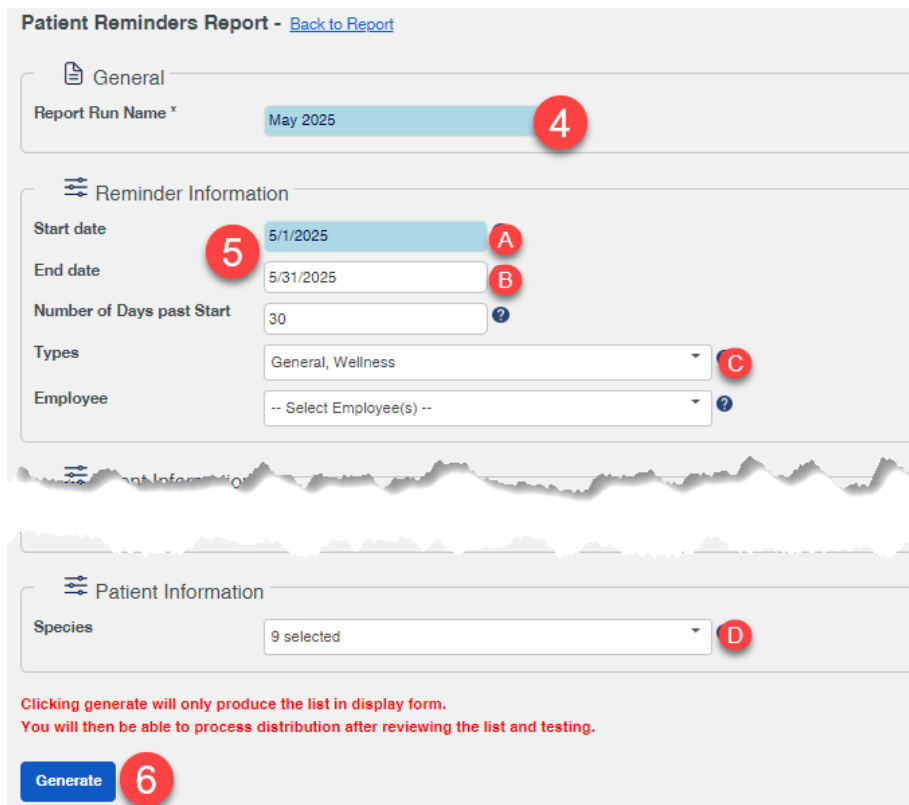


Next Month Reminders SOP

Running Next Month 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: May 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 in April 2025 and want to see the next months reminders, you would put your start date as May 1, 2025 and end date as May 31, 2025).
 - c. **Types**: Select Wellness and General
 - d. **Species**: Select all
6. **Generate**



The screenshot shows the 'Patient Reminders Report' form. At the top, there is a 'General' tab and a 'Report Run Name' field with the value 'May 2025' (callout 4). Below this is the 'Reminder Information' section. It contains fields for 'Start date' (5/1/2025, callout 5), 'End date' (5/31/2025, callout B), 'Number of Days past Start' (30, callout ?), 'Types' (General, Wellness, callout C), and 'Employee' (-- Select Employee(s) --, callout ?). Below this is the 'Patient Information' section, which has a 'Species' dropdown menu showing '9 selected' (callout D). At the bottom, there is a red warning message: 'Clicking generate will only produce the list in display form. You will then be able to process distribution after reviewing the list and testing.' and a blue 'Generate' button (callout 6).

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.

Next Month Reminders SOP

What to do with the Report:

1. The reports are pulled in Pulse and distributed to the staff on a MONTHLY basis. **You need to be pulling this report the first of every month for the following month.**
2. Staff members pull up the patient information and review the following information:
 - a. **Client Information:** you should confirm the following
 - i. Client first name and last name
 - ii. Secondary contact is listed appropriately (reminder if there is no last name on the secondary information, it will not show up under the client)
 - iii. Phone numbers have one marked as primary and are labeled as a cell phone. Also need the client's name on who it belongs to if there are multiple clients on the file.
 - iv. Confirm address looks valid (no 123 Fake Street).
 - v. Email address looks valid and there are no alerts like below.

Client Alerts A recent attempt to email the client has BOUNCED. Please get a new email. A recent attempt to email the client has BOUNCED. Please get a new email.

- vi. Client Alerts are cleaned up and deleted if there is unnecessary information.



If any of the client contact information is incomplete or incorrect, call the client and get up to date information – also schedule them for their next appointment!

- b. **Patient Reminders:** you need to clean up the following so that the PetDesk reminders are sent out correctly.
 - i. Review all patient reminders. If there are duplicate reminders like the image below, delete the unnecessary reminder.

Reminders - View Reminders Create Reminder	
Description	Reminder Due
▲ Interceptor Heartworm Prevention	7/9/2021
▲ Credelio Flea/Tick Prevention	7/9/2021
▲ Fecal Floatation Intestinal Parasite Screen	3/21/2024
▲ Distemper Vaccine ←	4/30/2024
Annual Exam	5/3/2025
Leptospirosis Vaccine	5/3/2025
Lyme Vaccine ←	5/3/2025
Lyme Vaccine ←	5/3/2025
Bordetella Vaccine	5/3/2025
4Dx Plus (Heartworm, Lyme, Anaplasma, Ehrlichia)	5/3/2025
Rabies Vaccine	5/3/2027
Canine Distemper Vaccine (DAPPi) ←	5/3/2027

Reminders - View Reminders Create Reminder	
Description	Reminder Due
Interceptor Heartworm Prevention ←	4/15/2025
Credelio Flea/Tick Prevention	4/15/2025
Leptospirosis Vaccine	5/2/2025
Interceptor Heartworm Prevention ←	7/4/2025
Rabies Vaccine (3 year)	4/3/2026
DHPP Vaccine (3 Year)	4/3/2026
Annual Exam	4/4/2026

Next Month Reminders SOP

If there are extremely old reminders, make a hospital decision if you want to retain those reminders (general recommendation is if they're over 2 years old, delete them).



[Fecal Exam \(Flotation\)](#)

4/20/2018

If you see the following on the report, it is due to your transition to Pulse. If you see these on your report, please let Michanne Sealund know as she'll confirm your new standard code is set to clear out that old code appropriately.

Wellness [Rabies Canine, 3yr](#)

[AP-MIGRATION - GENERIC ITEM \(Do Not Delete\)](#)

If there are concerns about reminders being appropriately synced or you have reminders you wish you had that aren't set up (like heartworm tests, fecals, etc), notify Michanne Sealund (Michanne.sealund@wellhaven.com) who will support.