

PetDesk – Working The Compliance Report

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Compliance

What is it: A tab in the PetDesk dashboard. It provides a list, updated weekly, of pets that have fallen out of compliance: They are past due for a service.

Best Practice: Call or digitally message the clients on the list to:

1. Get additional appointments scheduled
2. Update reminders on a pet's account
3. Inactivate folks that are no longer clients

Features to help you and your team tackle the weekly compliance list

1. Filtering: Type out a name or service in the text box at the top and click "Search".
 - a. Ex. You want to prioritize calling folks that are past due on their pet's rabies vaccine. Type "Rabies" in the text box, click "Search", and it will filter the list to only show you pet's past due on their rabies vaccine.
2. Noting: Leave internal notes after each call by click "Not Contacted"
 - a. CSR can leave a note and their initials

Contact Status Key

Not Contacted: Never been contacted by clinic.

Contacted - Unresolved: Client has been contacted but voicemail was left, a message was left with client, client relays they will call back to schedule or did not reply to message.

Scheduled: Client has scheduled an appointment.

Declined Services: Client is defaulting service for a period of time, declining completely, or due date is adjusted by clinic.

No Longer Client: Client should be marked as inactive in eVet (moved out of area, go to a different clinic, patient passed away).

Notes:

*Clients will fall off the list if they are inactivated in eVet or come in to update the out of compliance service/vaccines.

**Clients will stay on the list for a maximum of 6 months.
