PetDesk Scheduling a Requested Appointment

Last Modified on 01/05/2023 10:05 am PST

Scheduling a Requested Appointment:

1. Every item in your "Needs Attention" tab....needs attention! It includes cancellations, appointment requests, and medication refill requests.
2. Any item with a red bar (Morgan) is a cancellation (see PetDesk Best Practices on what to do)
3. Any item with a blue bar (Geoffrey) is a brand new request, no one had opened or clicked on it
4. Any item without a colored bar (Edynn) is a request that an individual has opened/clicked/working on.

IMPORTANT NOTE: Any requests will need to be scheduled by the CSR in eVet. PetDesk is a communication tool to avoid a phone call.

2. You have options when communicating back to a client.

1. You can notify the client of the time you got their appointment scheduled in your eVet using the "Schedule Requested Time". *Please note: we recommend scheduling all appointments in eVet prior to notifying the client in PetDesk.*
2. You can "Suggest Alternate Times" (if no availability in eVet): You'll give the client two date and two time options, depending on your best practice, we don't recommend holding those times in eVet. *Please note: we recommend pushing the options out a few days in advance in order to give the client 24(ish) hours to respond.*
3. You can notify the client of another date/time. Only use this option if it's been communicated to a client they're coming in outside of what they had originally requested.

3. When you respond to a client with their appointment day/time ("Schedule Requested Time" or "Schedule Other Date & Time") , the request will be removed automatically from the Needs Attention tab and be put in Scheduled. A client will, then, receive a confirmation with the date/time.

1. The "Scheduled" tab will import all appointments that came as a request through PetDesk and the CSR was able to schedule in eVet, in addition to, it will also include any imported appointments we see in eVet from our nightly sync.

4. When you choose "Suggest Alternate Times", the request is moved automatically form the Needs Attention tab to the Pending tab. A client will, then, receive a communication advising them to choose one of the two times that were sent back.

1. The "Pending" tab will house all clients that have been sent alternate times and the CSR is waiting on their response. *Please note: we recommend keeping one eye on this tab throughout the week so clients do not fall through.*