AVA RESOURCE GUIDE

Automated Scheduling to re-engage lapsed clients (outbound) & provide an alternative way to schedule for active & new clients (Inbound):

- Using your Ooma phone system
- Fully integrated with pulse
- Uses the same Vetstoria/AVA (online) schedule template

OUTBOUND Calls for LAPSED CLIENTS:

- PULLS **REMINDERS** from Lapsed Clients (this is synced just before calls are made)
- Current outbound campaign: all overdue annual exam, vaccines, wellness services (e.g. 4Dx, fecal etc.)-14-23 months
- Automated calls to clients are made weekly on Monday through Thurs between 4:00 pm-6:00pm
- **Services Due within the next 90 Days – Service Alignment:** AVA looks forward 90 days for ADDITIONAL services due when contacting the client
  - Example: It is December of 2025, the **Leptospirosis Vaccine** is overdue but instead of just scheduling a vaccine appointment with a technician, AVA will look forward (90 days) to schedule all four services with the doctor to align the January services as well

Reminders	
Description	Date
⊘ Leptospirosis Vaccine	02/21/2025
Annual Exam	01/24/2026
Heartworm Test (4DX)	01/24/2026
Bordetella Vaccine	01/24/2026
Canine Distemper Vaccine (DAPPi)	01/24/2028
Rabies Vaccine	01/24/2028

- AVA WILL NOT call overdue 4-week boosters only, fecal only, HW/FT only
- AVA WILL NOT call inactive patients, deceased etc. (as long as the pet is marked correctly in pulse)
  - Ongoing data cleanup of Reminders and Inactive/Active patients is crucial
- **Script** used when calling clients for overdue services:
  - ***LIVE***: " Hi <<ClientFirstName>>. This is AVA from <<OfficeName>>. Your pet is due for essential services such as vaccines and/or an annual exam. Would you like to schedule an appointment for these services for <<PetName>>."
  - ***If voicemail is left***: "Oh, sorry, <<ClientFirstName>>. I see I have reached your voicemail! This is AVA, calling from <<OfficeName>>. Your pet is due for essential services such as vaccines and/or an annual exam. Please contact us at <<ClinicPhone#>> or visit us at our website to schedule an appointment!"
  - ***Within 15 minutes of voicemail text message is sent:*** "Hi <<ClientFirstName>>, <<OfficeName>> here, Our doctor asked us to reach out because <<PetName>> is overdue for -<<Reminders>> - Due on: <<ReminderDueDate>>. You can easily book now <<WebsiteURL>> or give us a call at <<OfficeMainPhone>>. We look forward to seeing you and <<PetName>> soon! <<OfficeName>>. Reply STOP to opt out.

- Appointment is booked directly into pulse, looks very similar to a Vetstoria appointment

Visit Highlights	
Type	AVA
Description	AVA/Wellness / Vaccine Appointment-Annual Exam Specific provider chosen: Dr. Transcript link: https://am3.us/?R=dEQ5SHQ4QnY4Q
Appointment Provider	, D.V.M.
Client	Obrion (#350)
	, MN
Client Alerts	**Get updated address**
Patient	**Marmalade** (Female Spayed - 2 years 7 months) (#653)
Date of Birth	4/25/2023
Weight	10.8 LBS (4.8988KG)
Breed	Feline - DSH - Orange Tabby
Date Created	12/8/2025 1:12 PM

Marmalade Obrion
AVA/Wellness / Vaccine Appointment-Annual Exam Specific provider

- Both the clinic and the client receive emails confirming the appointment was made.

INBOUND Calling Function
- Client calls the clinic as they usually would. AI answers and asks the client if they want to schedule a routine appointment using the automated system AVA (Press 1) OR be connected to a member of the team (Press 2).
  - If clients request member of the team...it rings through to the clinic per usual
  - If client requests automated system, it schedules the appointment using the hospitals Vetstoria template that is already in place
    - pre-set trigger words re-direct client to schedule via clinic (any urgent, emergent, non-Vetstoria type appointment, anything you cannot schedule now, surgery etc.)
- AI phone identification to recognize patient in pulse
- If new client calls, AVA will obtain client information needed to schedule – schedules an appointment like Vetstoria does
- Both the clinic and the client receive emails confirming the appointment was made.

Examples of Client Calls
- Outbound Campaign transcript
- Inbound transcript

Please make sure that your CSR's do a review of Pulse each evening as there may be a need to adjust or contact the client for ~~an~~ AVA scheduled appointments. This will help to avoid inaccurate scheduling the day of.

If you have any questions or need any assistance, please reach out to your Med Ops Manager or email Tami at tami.rushing@wellhaven.com