B. Client Communication and Scheduling Appointments

Client Greeting

- **Phone**

  - Answer the phone by the second ring.
  - Identify the Clinic and your first name when answering the phone. This lets the client know they have called the correct phone number and with whom they are speaking. For example, "DeZavala Veterinary Clinic. This is (your first name). How may I help you?"
  - Have a smile on your face – this smile comes through to the person on the other end of the phone.
  - Don't talk to other people while you are on the phone unless absolutely necessary.
  - Try to turn negative moments or ideas into positive ones when possible.
  - When asking the caller if you can put them on hold, wait for an answer—they may not have time to wait and would rather call back later.
  - Use polite comments like please, thank you, excuse me, I'm sorry, may I, etc.
  - Listen closely to what the person is saying. Also listen to the tone of voice or the mood they are in as clues to understanding them. You may want to take brief notes as they talk so you don't forget anything. It is good to repeat in a summary form what they said to make sure you truly understand what they said. When you repeat it back, they may even realize they didn't give you all the information you need.
  - Use their name and the name of the pet(s) they are calling about during the conversation.
  - Avoid making assumptions. If you are not positive of what they are saying, ask questions.
  - Many times the first impression a client has of our clinic is a talk with the receptionist. A good impression goes a long way in starting a long strong business relationship.
  - Show that you have pride and enthusiasm in your job as well as pride in the services provided by the Clinic.
  - Learn as much of your job and the business as possible and be able to talk to the client with confidence. If you have confidence in what you are saying, the client will more likely have confidence in you and the Clinic. If you do not know something, it is better just to tell the person you don't know. Tell them you will get an answer and get back with them or tell them you will put them on hold and find someone who can give them the information they need.
  - Ask questions if you don't understand what they are saying or if you need more information.
  - Be efficient and let them know you sincerely want to do everything you can to help them.
  - Talk in a clear, well-modulated voice. Don't speak too fast. Don't ramble.
  - Avoid interrupting someone as they talk.
  - If you must disagree with someone, do it in a polite, respectful manner.
  - Get to know the clients. Ask them about things going on in their lives (vacations, grandchildren, etc.). In trying to be congenial though, don't ask questions of a client that might be considered too personal.
  - Be the last person to hang up. It may seem they have finished the conversation when in reality they may have only had a pause in the conversation.

- **In Person**

  – Many of the courtesies mentioned in phone conversations also apply when talking to clients in person. Please also read the above information.
  – Greet clients as they come in the door. This helps build good will and makes for pleasant conversation. Ask how you may help them.
  – Please remember to show courtesy to clients by setting aside paperwork or stopping a personal conversation when a client enters the Clinic. If you are working on one or several things and setting them aside is not feasible, greet the client and ask if they can wait a moment for you to finish what you are doing. Most clients know how paperwork can pile up and are willing to wait a few minutes when necessary.
  – If busy with other clients, let the client know you are aware they are there by telling them you will be with them in a moment. If you are on the phone with another client, a simple wave with a smile will let them know you are aware of their presence. You will find most clients are very understanding and are willing to wait, as they know they can expect the same level of service when you are helping them.
  – Look at the person or persons you are talking to.
  – Use the person's name and pet's name as you talk with them.
  – Don't whisper to someone else in front of a client. If what you have to say is private, ask to talk with the other person somewhere in private.
  – There are times when a client's pet is seriously ill or has died. Be respectful of the owner's feelings. Let them talk if they need to.
  – In an effort to be congenial and develop rapport with a client, it is easy to spend too much time with one client while other clients are waiting for assistance. Be in tune to the other clients. Gracefully ease out of the conversation and on to other clients who are waiting for assistance.

Other Notes on Client Communication

Because the receptionist is often the first and last point of contact for a client, a client will often rely on you to answer their questions. Therefore, it is important they are given accurate information regarding questions concerning their pet's health (vaccinations, preventatives, food, etc.) as well as cost estimates. Often a client is provided with a lot of information at once during a visit. Therefore, it is important to explain things in an easy to understand manner. If necessary, printing out a form or writing it out can be very helpful for the client. If you are unaware of the answer to a client's question, please ask another staff member such as a senior receptionist, technician, or doctor. It is better to take the extra step of getting the correct information than guessing and possibly providing the client with wrong information. In some instances, wrong information could have serious consequences to the pet's health (such as telling a client their pet was given medicine when in fact it was not [example: insulin in a diabetic pet]).

Because the receptionist is the first point of contact on a phone call or in person, a client may ask your opinion about their pet's health based on the symptoms they describe their pet is having. Sometimes the client can be so persuasive in trying to get a diagnosis that it is tempting to try and guess the pet's condition based on knowledge gained over time. However, trying to diagnosis a pet's condition can be very dangerous and not beneficial to the pet—especially if your diagnosis is incorrect. In situations like this, explain to the client that a diagnosis would need to be made by one of the doctors after seeing the pet. If the client continues to try and get a diagnosis from you, let them know it would not be in the best interest of their pet for you to try and guess their pet's condition—this is best left to the doctors.

- Advice concerning appropriate preventatives is acceptable. Be sure to gather important information about what the client is looking for in flea/tick or heartworm prevention as well as the pet's lifestyle (i.e., is the pet exposed to ticks such as camping, at a lake, etc.). Check to see when the pet had its last heartworm check.

- Advice about medicines (other than preventatives), including prescription food is NOT acceptable and should be directed by a doctor.

If you have any questions about what is or is not appropriate to tell a client, ask a doctor, technician, or senior receptionist. Our desire is that you enjoy working with the clients and their pets and continue to increase your knowledge of veterinary medicine. In that respect, we encourage you to ask questions so that you will be able to help the client as much as possible, and at the same time avoid any miscommunication.

When someone calls to obtain price quotes, ask if they would like to set up an appointment.

As a client is checking out, ask if they need any more pet food or other supplies for their pet. It would save them a trip later if they buy it at the time they are already here.

Scheduling Appointments

- Determine what the client's need is for their pet. This will help you determine whether an appointment or procedure drop-off needs to be scheduled. Appointments are typically scheduled every 15 minutes. However, longer appointments such as an illness may take longer and need to allow for more time between appointments. Also, the number of available doctors and/or procedures can increase or decrease the number of appointments that can be scheduled.

  - Anesthetic and Grooming procedures are scheduled Monday through Friday only.
  - Dr. Wilcox works Monday – Friday from 9 a.m.-4 p.m. with her last appointment at 3:30 p.m.
  - Dr. Harrison works Monday – Friday from 12 p.m.-7 p.m. with his last appointment at 6:30 p.m.
  - Both doctors work 9 a.m.–1 p.m. on Saturdays with the last appointment at 12:30 p.m.
  - Surgeries are from 12 p.m.–3 p.m. Don't make appointments unless no surgeries are scheduled.
  - Please try to schedule euthanasia appointments at the end of the day (6 p.m. or later during the week or 12 p.m. on Saturdays). This is an emotional time for the owner, and we would like to provide them as quiet an environment as possible away from other pets and clients. However, if the owner wants to come in earlier, please accommodate them as much as possible. Keep in mind how busy the clinic may be that particular day. We don't want to be so busy that we are rushed during such a time.
  - Please try not to schedule new clients at the end of the day (no later than 5:30 p.m. during the week and 12:00 p.m. on Saturday). It takes time to process a new client. Also, new clients have a higher rate of not showing up for their appointment compared to established clients.

- Making appointment on IntraVet:
  - In the appointment calendar, go to the day the client wants an appointment. Use arrows to select day (double arrows advance a week at a time). You can also type in the date you want to go to.

- Double-click on selected time for the appointment and enter client number if you know it. Usually, you will type in the client's last name. Then, if you press the F3 key, you will be able to see the pet names for each client as you arrow down. Once you find the person with the pet, select that client. Go to the pet name field and arrow down until you reach the appropriate pet. You could also start typing the pet's name and the system will find it for you. **If scheduling a new client in IntraVet, enter the number "1" for the client number and then press Continue to obtain the screen that allows you to enter information for the new client. This does not create a permanent IntraVet file for the new client (sometimes they may not end up coming here). When talking with them request they bring a copy of their pet's medical history for our files. A copy can be made when they arrive, and the originals returned to them.**

NOTE: For new clients, type in the information requested into the appropriate fields. I.e. Client's last name, first name, pet's name, reason for appointment. In the notes field, type in the new client's phone number (usually home phone number).

- Put in the reason for the appointment. Make sure to record surgeries, dentals, grooming, and other procedures on the "Procedures" calendar. Regular appointments are put on the "Appointments" calendar.
- If you need to add information, type it in the Note section.
- More specific instructions for making an appointment are in the IntraVet User Manual.

- If a client requests a particular doctor, please indicate such a request along with the reason for the visit. (Example: Vaccinations—Dr. X). Abbreviate as necessary or indicate more information is in the notes field. (Example: Vaccs, Exam—Dr. X—See Notes). Also, check the "Client requested this doctor specifically" box to highlight the request.

- Repeat to the client the day and time of the scheduled appointment. If the appointment is far in advance or if the client requests a reminder, use the appointment cards to write the appointment down for them. In some cases, a reminder card may be sent to remind the client of their pet's appointment time.

NOTE: If owner reports urinary problems, be sure to tell the client not to let their pet go to the bathroom for at least 2 hours before the appointment. The doctor may need to do a urinalysis in such cases.

NOTE: Walk-ins (those without an appointment) are accepted in most cases for nongrooming and nonprocedure appointments. Please advise the client they are welcome to wait and that it may be a few minutes (longer if busy).

- Use the Boarding book for making boarding reservations. In the boarding book, write the pet's name and owner's last name along with date of pick-up on the first day of boarding. Example: "Gigi Jones→12/27/10". For new clients, add the pet's breed, estimated age/weight if known and client's phone number. For the in-between days, only the pet's first name and pick-up date need to be written in the boarding book. Example: "Gigi→12/27/10". For the pick-up day in the boarding book, divide the boarding box in half and write the pet's name and "Home". Example: "Gigi--Home".

- Remind clients when scheduling boarding or procedures of any preparation that is necessary for the visit. Check on IntraVet if the pet is up-to-date on vaccinations. Inform the client know of any vaccinations their pet will need for their stay at the clinic.

- Please note boarders can only be dropped off and picked up during business hours. After hours, Sunday, or holiday drop-offs or pick-ups require special arrangements for a fee.

  NOTE: At times a client may request a larger cage for a pet. In such cases, inform them we try to put pets in larger cages as they become available; however, we can not guarantee a larger cage for a pet. The client may say they are willing to pay for the larger cage; however, we still can not guarantee a larger cage. Doing so would leave only smaller cages, which would leave no space for our larger boarding pets. You can explain to the client that we have a limited number of large cages and runs.

- If the pet is just boarding, it can be brought in at any time of the day.

- Anesthetic procedures such as a dental, spay, neuter, declaw, etc. need to be NPO the night before. This means the pet should not have any food or water after midnight before surgery. Exceptions might be if the pet is a diabetic or if the pet is a rabbit (they eat so little each time they eat). Also let the client know they need to bring in their pet between 7 a.m.–8 a.m. the morning of the procedure. Having them at the Clinic during this time allows technicians and doctors to examine the pet and get them on the procedure list for the day. There may be exceptions to this policy. If you have any questions, please check with a doctor.

    - Ask a doctor whether the pet should be NPO or not if pets are younger than 4 months. These pets need to eat on a regular basis to keep the blood sugar up.
    - Some exotics should not be without feed and water. Also diabetics—check with a doctor.

- For overnight procedures such as a spay or declaw, let the client know the pet typically stays overnight unless the doctor tells them otherwise. Such a case may occur if the pet recovers quickly from anesthesia. If the pet needs to stay overnight, it may be picked up after 10 a.m. the next morning. This helps ensure the pet has a confined area to help keep it calm for healing as well as provide the attending doctor time to exam the pet before it goes home.

- NOTE: Pets to be groomed also need to be brought in between 7 a.m.–9 a.m. in order for them to be done during the morning kennel person's shift and have enough time to dry properly for baths.

- Please ask a technician or doctor OR refer to Preparation Instructions (TBA) for other procedure instructions such as bile acid testing, heartworm treatment, etc.

- For pets boarding, receiving grooming services, or having an anesthetic procedure, notify the owner of any vaccinations that may be due for the pet. If no record of current vaccinations is in the computer or on the record, ask the client to bring this information with them. **Otherwise, the vaccinations will be given. Notify client of this. It is on the form but it helps if you mention it since not all clients thoroughly read the forms.** Current vaccinations provide protection both for the client's pet and for other pets in the Clinic. If needed, we can call the pet's previous veterinarian to obtain needed vaccination information.

    - Make and attach a copy of any vaccination history the client provides. Write when the vaccinations were given (not when they are due) in the special notes field on

the pet's record. Return originals to the client.
- Remember to add the pet's vaccinations to the pet's medical history in IntraVet as well so they will receive a reminder when the vaccinations are due. This is not necessary if the client goes to another vet and is only boarding the pet at the Clinic. In this case, please indicate such in the special notes field (i.e., Boarding Only) on the pet's record. This will prevent the client from receiving a reminder from multiple clinics.

- Do not write anything on the records until the client arrives with the pet(s).
- See the Boarding section of this manual for further information on boarding.

Urgent vs. Nonurgent Appointments

There are some instances in which a pet may need to be seen right away or the same day. Such cases include if the owner reports the pet has been vomiting, has diarrhea, blood, cuts, and/or broken bones.

Other services such as vaccinations, nail trims, express anal glands, etc. typically do not require a same-day appointment; however, may be scheduled when time is available.

Obtaining Pet Medical History

An owner's permission must be obtained before releasing or obtaining pet medical history information (vaccination confirmation does not require owner permission). Permission may be written or verbal. If verbal, it is to be documented on the pet's record. A fax or email indicating the owner's permission for release of their pet's medical history information is also acceptable. Medical History Release/Obtain Forms are available in the Client Relation's file drawer for the client to complete. Attach any written authorization to the pet's medical record.

Preparing Next Day's Forms

- Hospitalization form is used when pet is to be anesthetized or pet is dropped off because ill.
- Boarding form is used when pet is to be boarding or pet is dropped off for day to receive vaccinations.
- Grooming form is used when pet is to receive grooming services.
- Euthanasia form is used for pets to be euthanized.

NOTE: Patient forms can be printed by selecting "Client Forms" under "Communications." Enter client name or number, choose pet needing form and select appropriate form. Click print. If new client, use general forms located in the receptionist's file drawer.

- Create cage card for any pet that will be staying for a day or more, using one of the following cage cards:
  a. Procedure cage cards, used for hospitalization and procedures
  b. Plain white cage cards, used for boarding and grooming

No-Show Appointments

At times, a client may not show up for their scheduled appointment or boarding reservation. In this case, if the client has not called to notify of the missed appointment or boarding reservation within a reasonable time (usually one hour after the scheduled time), call the client to see if would like to reschedule or if no longer needs the appointment or boarding reservation. If the appointment was for an illness, call to check on the pet's status to see if the pet still needs to be seen. This phone call gently communicates to the client (without saying) that appointments and boarding reservations are taken seriously and are expected to be kept or notified when need to be cancelled or rescheduled.

For missed scheduled appointments, mark the client's account as a No-Show by right-clicking on the client's appointment and selecting Record No-Show. This helps identify clients who have a pattern of not showing up for appointments so we can appropriately schedule other appointments around them.

Receiving Appointments

- In IntraVet, right click on scheduled appointment and select "Client is In."

- Locate the pet's record in the appointment rack and write the current date and reason for visit. This helps the doctors and technicians know how to prepare for the appointment. (i.e. they can draw up vaccinations or take a blood/fecal sample before the doctor enters the room.)

- Weigh each pet before putting in an exam room. Put its weight on the chart under the date of visit. This gives the doctor an accurate weight should medicine be dispensed. Also, many clients are interested in their pet's weight development.

  - If the pet is aggressive or if the front area is congested and weighing the pet would cause discomfort to others, put the pet in the exam room and notify the doctor or technician so they may take a weight at a more appropriate time.
  - If the pet is very small (puppy or kitten) or is in a carrier, you can either weigh the pet in the carrier and subtract the weight of the carrier once the pet is in the exam room and outside of the carrier or you can ask the technician to weigh the pet once it is removed from the carrier.

- Make sure an exam room is clean on both the counter top and floor before putting a pet in it. If dirty, choose another exam room. If all exam rooms are dirty, ask the client to wait a moment while we have it cleaned—either you can clean the exam room or notify a technician if not busy.

- Once inside the exam room, close the door behind you to prevent other pets from entering the exam room. Let the client know a doctor will be with them shortly. If the client has requested a specific doctor (either verbally or on the appointment calendar), notify that doctor his/her patient has arrived.

- **Note for New Clients**—Give them a New Client Form to fill out. They can either complete the form out in the waiting area or inside an exam room, whichever is more convenient. If completing the form in the exam room, be sure to check back with them in a few minutes to take the form and start a record.

  - Make copies of any medical records the client may provide, and return originals to client.
  - **Add any vaccinations to the pet's medical history in IntraVet so a reminder will be generated when due.**

Whether the pet is boarding or is having a procedure done, put the records in the appropriate acrylic slot near the dental sink in the treatment area.

Do not write anything on the records until the client arrives with the pet(s).

See **Pet Care Information--Boarding Pets in** section G for checking-in boarding pets.

Checking Pets Out

- Invoices will normally already be entered by the doctor or tech.
- If the invoice is not already created, enter client number, press ENTER until you reach the screen where you can add to the invoice.
- Select “Payment” and enter amount in the proper place (cash, check, cc, etc.).
- Save, then save permanently, and print.
- Purchases (food, medication, etc.): Enter client # or last name, select proper patient, click invoice, enter until doctor’s initials are needed. Enter either doctor’s initials, “Enter,” tab to where you are able to type in what is being purchased, tab over to the quantity (if more than 1) and enter quantity being purchased, “Enter,” select payment, enter amount being paid, save, and print.
- Additional information on invoicing clients can be found in the IntraVet User Manual.

After patient leaves, put paper record in stack with other records of that day. At the end of the day, put all the day’s patient files on Dr. Harrison’s desk to review. After the doctors review the files, they will put them in the filing tray.

See **Pet Care Information--Boarding Pets** in section G for discharging boarding pets.

Discharge Instructions

Often times, a doctor will have discharge instructions for a hospitalized pet. For non-routine cases, these instructions are usually provided to the client by phone or in-person prior to releasing the pet. Sometimes the discharge instructions are printed out for the client. If the client has not yet received discharge instructions at check-out, please ask a doctor or Veterinary Nurse to go over the discharge instructions with the client before bringing the pet up front to be released.

For routine procedures such as spays, neuters, declaws and dentals, you will need to provide the discharge instructions as follows.

Spays and Neuters

- Keep pet quiet for the first few days (i.e. no running or jumping--confine if necessary).
- Give pet any pain medications dispensed as directed.
- Bring back for suture removal if have external sutures.
- Pet may be bathed after 2-3 days if sutures are buried; otherwise, need to wait until external sutures are removed before bathing.
- Give copy of pet's bloodwork to owner.

Cat Declaws

- Keep pet quiet for the first few days (i.e. no running or jumping--confine if necessary).
- Give pet any antibiotic medications dispensed as directed.
- Use special cat litter provided by the Clinic for the next 3-4 days.
- Pet may be bathed in 2-3 days if no external sutures present from other procedures.
- Give copy of pet's bloodwork to owner.

Dentals

- Give pet any pain and/or antibiotic medications dispensed as directed.
- If owner is concerned about pet's eating, can soften dry food with warm water for the first few days.
- Give copy of pet's bloodwork to owner.

New Clients

- When a new client comes to the Clinic, ask them to complete a registration form. This helps provide us with necessary information for both the client and pet(s).

- After the client has completed the registration form, click on the "New Client" button on the main "Client Action" screen. You will then be prompted to issue the client an account number. The default is 99999. To issue the proper number, look up the next available client number on the account number list located on the receptionist counter. Be sure to confirm this number has not already been used. Once you have an acceptable client number, mark out that number on the printed list so the next person will know which number to start with for the next new client.

  Next complete the following information under the Client information screen:

  - First Name
  - Last Name
  - Salutation—this can be chosen by scrolling down the salutation list or by typing in appropriate salutation
  - Street Address
  - Zip Code (local zip codes will automatically fill in the city and county for you)
  - Phone Numbers (including home, work, and emergency when provided)
  - If married or co-owner, type in this name in the last field
  - Under the "Setup" tab, enter in how the client found out about the Clinic. This information can be entered by scrolling the choices (Client Referral, Drive-By, Other, Yellow Pages) at the bottom of this screen. This information is useful in determining how our clients find out about the Clinic and which areas are proving to be productive.

    If a referral, please enter in the referring client's name. In the case of multiple clients with the same last name, it may be necessary to go into each file to find the correct referring client. At the end of the month, a coupon for $5 off their next visit will be sent to the referring client as a thank you for their referral.

- Once the Client information screen is completed you can start adding the client's pet(s) under the "New Patient" screen. The following information needs to be completed as much as possible under this screen:

  - Pet's Name
  - Species (Canine, Feline, Avian, etc.)
  - Sex (Male, Female, Spayed, Neutered)
  - Birth Date
  - Weight (may need to be completed during invoicing)
  - Breed
  - Color

- If the client provides a medical history, make a copy for the record and return the originals to the owner. Sometimes the client will have the medical history faxed to us. Otherwise, we may need to call the clinic where the pet was seen to obtain medical history (i.e., vaccination history before a procedure or boarding). When calling another clinic for vaccination history, be sure to identify yourself and our Clinic so they know whom they are speaking with. While the pet may not have had all vaccinations and tests, we like to inquire if the pet had the following:

Dogs		Cats
DHLPP or DHLPP/CV	HW √	FVRCP or FVRCP/FeLV
RV	Fecal √	RV
Bordatella		

- Be sure to write any vaccination information (including heartworm and fecal tests and when provided the results of these tests) at the top of the record in the "Special Notes" area. **Please write the date the vaccinations and/or tests were done, NOT when they are due as different clinics and different states have different due dates for various vaccinations and/or tests.** These vaccinations also need to be entered into IntraVet for the date they were done under "Patient History" – "Edit History." This allows for a computer reminder to be generated when the vaccinations are due.

  NOTE: When entering vaccination history for a client's pet from another clinic, you may need to manually overwrite the vaccine description under Edit History (Patient History→right click→Edit History) or manually change the reminder due date of a vaccine under Reminders (Patient History→right click→Reminders).

- Make a record sheet for each pet the client brings in. Fill in appropriate information. Use blue or pink to highlight gender and pet name. Put green line under pet name if potential danger to staff. Take picture of pet(s) while in exam room and put red check in appropriate box on pet file.

Current Client With New Pet

Client does not need to complete a registration form unless inactive for over 3 years (see below).

In client's file on IntraVet, add new pet by following the instructions above regarding "New Patient." Also, be sure to obtain any medical history. Add any vaccinations to the pet's medical history as mentioned above.

NOTE: Client records are kept in the computer and the filing cabinet for 3 years. If no activity occurs after 3 years, the file in IntraVet and the folder are removed. The physical folder is in storage for an additional 2 years. This is important to note as some clients may have moved away years ago and have returned. In such cases, the client will need to complete a registration form.

Separate Account for Older Children, Boyfriend/Girlfriend, Etc.

Whenever you are aware of a situation where an older child who is essentially on their own (even if still living in the parent's household) has a pet of their own, a separate account is to be created for the older child. The same applies to similar situations such as a boyfriend and girlfriend--even if living together. This policy would also include live-in or out-of-town family members, friends, or any other similar situation.

This policy is to avoid the legal complexity that can arise in the event the older child, boyfriend, girlfriend, family member, friend, etc. defaults on payment.

New Client Welcome Packets

As a way to welcome new clients and help them learn more about the Clinic, we send new clients a Welcome Packet at the beginning of the month following the month of their first visit (i.e. Welcome Packet sent to new client in February following first visit in January).

Welcome Packets may be prepared ahead of time, so only the address label and postage is needed at the time of mail-out.

Preparing Welcome Packets:

- Place Clinic brochure and magnet inside Clinic envelope. For best results, turn colored part of magnet towards outside of envelope to prevent ink from smearing on brochure.
- Seal envelope and store until needed.

Sending Welcome Packets:

- Run New Client search from IntraVet. Communications-->New Clients-->Search-->enter beginning and ending dates of search period-->check box to "Eliminate temporarily added new clients"-->click Begin Search button.
- Once search is completed, click on Print List button then Print.
- Using Avery address labels, Print Labels of new clients. There are 20 labels per sheet.
- Review list of new clients. Cross off any new clients whose only visit was to euthanize a pet. We do not want to remind the client of such a sad event. Remember to also remove or cross off same name on labels. The easiest way to review list is to go into IntraVet Client Management window, enter client number of first new client, press F3 to see new client info as well as list of their pet(s). This will let you know if they still have an active pet. Keeping F3 window open, scroll down client numbers and compare against list. Send Welcome Packet only to those clients with at least one active pet.
- Place address label on prepared Welcome Packet envelope.
- Place postage on envelope and mail.

NOTE: Welcome Packet supplies (brochures, magnets, envelopes, and address labels) are stored in break room cabinet(s).

Client Referral Coupons

Because referrals from clients is such an important part of any business, we want to thank those clients who have put their trust in us and recommend their family and friends to us. Our way of thanking them is to send a postcard coupon for $10.00 off their next visit to the Clinic. This coupon is processed at the beginning of the month following the referral and is good for one year from the end of the previous month (i.e. referral made in January; coupon printed in February; coupon expires at end of January the following year).

Processing Client Referral Coupons:

- Run Referring Client search from IntraVet. Communications-->Referring Clients-->Search -->enter beginning and ending dates of search period-->click Begin Search button.
- After search is completed, click on Print Cards button. Use 3-up laser postcards to print referral coupons. The position of the cards will depend on the printer you are using. The computer will ask you to select text before printing. Choose "Thanks" text then press Select button and Start Printing.
- Highlight discount amount info "$10.00 OFF YOUR NEXT VISIT" on printed postcards.
- Write in expiration date of coupon.
- If client has referred more than one client as indicated on the coupon, change the coupon amount by $10.00 for each additional referral (i.e. 2 referrals is $20.00 coupon).
- Place postage on postcard and mail.

End of Section