

## E. Other Client Service Areas

### Manual Reminder Cards



date card is to be mailed (one week before due date) → 2:17  
PLACE STAMP HERE

address: Mr. & Mrs. Smith  
24 Lake Wind  
San Antonio, TX  
78130

DeZavala Veterinary Clinic  
4939 DeZavala Road  
San Antonio, TX 78249  
(210) 699-3939

Name of Pet Morgan Due Date 2:24:03

Our records show that your pet is due for the following vaccinations and treatment(s):

<b>DOG:</b>	<b>CAT:</b>	<b>YOUR PET NEEDS:</b>
<input checked="" type="checkbox"/> Distemper	<input type="checkbox"/> Feline Leukemia	<input type="checkbox"/> Heartworm Preventative
<input checked="" type="checkbox"/> Hepatitis (CAV-2)	<input type="checkbox"/> Rhinotracheitis	<input checked="" type="checkbox"/> Fecal Check (Bring Stool Sample)
<input checked="" type="checkbox"/> Leptospirosis	<input type="checkbox"/> Calicivirus	<input type="checkbox"/> Suture Removal
<input checked="" type="checkbox"/> Parvovirus	<input type="checkbox"/> Panleukopenia	<input type="checkbox"/> Recheck Exam
<input checked="" type="checkbox"/> Parainfluenza	<input type="checkbox"/> Chlamydia	<input type="checkbox"/> Dental Care
<input checked="" type="checkbox"/> Coronavirus	<input type="checkbox"/> Rabies	<input type="checkbox"/> Flea/Tick Preventative
<input checked="" type="checkbox"/> Rabies	<input type="checkbox"/> Feline Leukemia Test	<input type="checkbox"/> Other _____
<input checked="" type="checkbox"/> Bordetella	<input type="checkbox"/> Other _____	
<input type="checkbox"/> Heartworm Test		
<input type="checkbox"/> Other _____		

# check everything that pet is due for

Please call for an appointment.

12385 #12385 — © Medical Arts Press 1-800-329-2179

Reminder cards are used to remind a client about puppy/kitten boosters, tests, and/or services such as a suture removal are due. For such cases, we use hand-written reminder cards. On the front of the card write the client's name and address. It is customary to use a salutation such as "Mr. & Mrs.," etc. when sending a client information by mail. On the reverse, write in the pet's name and due date for the services. The main part of the card has descriptions which can be checked off for the appropriate reminder. If the service is not listed, write it in under "Other."

Once completed, estimate a mailing date (usually 4-5 business days before the due date, remembering to take into account Sundays and holidays) and write this date on the front in the postage area in pencil. The card is then ready to be filed in the index card box according to the mailing date.

The night before, check the reminder card box and pull and stamp reminders to be mailed the next day and put in "Outgoing Mail" box on front counter.

NOTE: Due to the frequency of puppy and kitten reminders, these types of reminders are done by hand using the reminder cards described above. **The doctor will write on the record if a reminder card is needed.** Regular reminders for annual vaccinations are generated by the Practice Manager and sent out each month.

## Computer Generated Reminders

### **First Reminders**

Reminders are to be generated around the 20<sup>th</sup> of the month for pets due for services the subsequent month. For example, generate reminders in June 2005 for services due in July 2005.

### **Second Reminders**

On approximately the 5<sup>th</sup> day following the month services were due, process second postcard reminders for pets. For example, generate reminders in July 2005 for uncompleted services that were due in June 2005.

### **Instructions for Processing Computer-Generated Reminders**

- **First Reminders – 20<sup>th</sup> of month**
  1. Open Intravet – Communications – Due Reminders - Search
    - A. Type in beginning and ending days of the next month.
    - B. Leave Species box blank.
    - C. Leave All Ages in age box.
    - D. Leave Recall box blank.
    - E. Delete entry in Max Recall Limit box. This box should be blank for zero recalls.
    - F. Leave the next six rectangular boxes blank in order to search for all due services.
    - G. To do a real search place a check in **REAL search** box.
    - H. Click **Begin Search** icon.
  2. Print cards (use cute reminder card stock)
    - A. Click on **Print Cards** icon.
    - B. Select the boxes for **Include Clients with Future Appointments** and **Multiple Pets on the Reminder Cards or Letters**.
    - C. Click **Select Text** icon.
    - D. Choose **Pet Reminders** – click the **Select** icon.
    - E. Place 3-up laser postcards in printer.
    - F. Print a sample to be sure search information is correct and cards are positioned correctly by typing 3 in **Print Next** field and clicking **Start Printing** icon.
    - G. If sample printed correctly, delete the 3 from the **Print Next** field and click **Start Printing** to print the rest of the cards. If print is not correct, make necessary adjustment. Select to start from client account 1\* and print another sample of 3, then all cards once satisfied with print sample.
    - H. Pull reminder cards going to clinic employees and place in their in-box.
    - I. Check that addresses are complete on all cards. The Post Office will return mail with incomplete or wrong addresses.
    - J. Review reminder cards for anything unusual and forward such cards to the Practice Manager for review.
    - K. Place postcard rate postage on remaining cards and mail.

- **Second Reminders – 5th of month (use generic reminder card stock)**

Follow the above steps to process second reminder postcards, except enter the previous month for the date range in the **Search** section and select **Past Due Reminders** for the text in the **Print Cards** section.

\* Even though you enter client account 1, the computer will start printing from the first client in the search.

## **Call-Backs**

At times a doctor will request a client be called on a certain day to check the status of a pet, especially one that has been ill. These call-backs help the doctor determine that prescribed treatment is working well for the pet. In some cases, the pet may need to be seen again and a different course of treatment prescribed.

When calling a client for a call-back, be sure to identify yourself and the Clinic at the beginning of your conversation or message. Be sure to write any descriptions the client uses in reference to their pet (such as “much better,” “medicine seems to be working,” etc.) It is extremely important you notify the attending doctor of any problems the client discusses with you concerning the pet. The doctor needs to know this information in case a different course of treatment is needed. Our goal at the Clinic is to help recuperate the pet as quickly as possible.

## Moved Clients

At times we will be notified a client is moving or has moved either by the client or by returned mail. When this happens, the following procedure should be followed.

- As a courtesy to the client who is in the process of moving, print out their pet(s)' medical history for them to take to their new vet. In IntraVet, pull up pet record and go to Patient History – Print – again press Print. This will give the whole history for the pet. (No date range needs to be entered unless pet has a large medical history.)
- Once the client has moved, note this under the “General” tab in the Edit Client section in IntraVet.
- Also, be sure to uncheck the reminder box for each pet in the Edit Patient section. This keeps a reminder from being sent to an insufficient address.
- If we receive returned mail, compare the address on the piece of mail to both the computer and the physical file to see if address changes have been made. Also, sometimes returned mail shows the client's new address on the yellow return label. In such cases, update the computer and physical file to reflect the new address and resend to new address.
  - If address is out-of-town or unknown, follow the above procedure of noting the client moved or need current address/phone number as well as unchecking reminder box.
  - If client is still in-town, but at a different address, simple update the computer and file. In such case, there is no need to uncheck the reminder box for each pet.

NOTE: Once we have been notified of the client's new address, remove the “Moved” message under the General tab in the Edit Client section, and recheck the “Send Reminder” box in the Edit Patient section. This will reestablish mailing of reminders.

### **Aging Medication & Preventative Refills**

Clients will often call in a refill for medications or preventatives. These refills are keep up front in the acrylic wall trays in the Receptionist area. If the client has not picked up the refill in 2 weeks, call the owner to notify the refill is at the Clinic and available for pickup. Note the client's record when contacted. Refills that have been sitting in the trays for 3 weeks or more need to be put back into stock. Be sure to take the charge out of the client's account in IntraVet and note on the client's record that the item(s) was put back in stock.

**End of Section**