

## HOW TO: Use the Compliance Report

## What is the Compliance Report?

AND WHERE CAN I FIND IT?

The Compliance Report shows all noncompliant clients who received their final Health Service Reminder and have not scheduled an appointment.

We consider clients "non-compliant" if they have not scheduled an appointment after 3 weeks of receiving their final Health Service Reminder.

This tool is key in not only helping keep pets healthy, but can also be utilized when there are spots to fill on the schedule. **Right here!** 



		PetDesk Animal Hospital					
Pe	etDesk	ALL REQUEST	S NEEDING YOUR RESPONSE				
Client Messa	oging O	SK	Serena Keating (xxx) xxx-xxxx a@com Client ID: New Client				
<ul> <li>PENDING</li> <li>SCHEDU</li> </ul>	ATTENTION 8 G 4 DLED		Daniel Enos (xxx) xxx-xxxx a@com Client ID: New Client <b>W Other pets missing reminders</b>				
Client Succes	SS O		Kelsea Tomczak (xxx) xxx-xxxx a@com Client ID: New Client				
S BILLING CALL LIS FORMS	7 ANCE		Marga O'Flaherty (xxx) xxx-xxxx a@com Client ID: New Client <b>W Other pets missing reminders</b>				
CLIENTS MASS M K REVIEWS	& PETS ESSAGES S		Dennis McCracken (xxx) xxx-xxxx a@com Client ID: New Client <b>&amp; Other pets missing reminders</b>				



### How do we use the Compliance Report? **STEP 1: CHOOSE YOUR PARAMETERS**

- The Report Start Date: This filter selects how recently the patient became non-compliant. By default, the page shows the most recent non-compliance cut-off date, 3 weeks ago.
  - EX. if you select December 20th, the report will display patients who became out-of-compliance the week of December 20th. If you select an earlier date, such as July 20th, the report will grow to include all patients who have become non-compliant since July 20th.
- (Optional) Refine the report by **Name or Service.** Search for particular clients, patients, or services by name (i.e., Rabies) to narrow the displayed report.
- Filter by Status can be used to narrow the report to only display clients not contacted, clients already contacted, and more. We'll go over these later.
- When you're done choosing your parameters, click "SEARCH".



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#### **STEP 2: CONTACT THE CLIENTS!**

Use the 'Client' column's info to reach out to the client about their pet's health needs and asking about scheduling an appointment to update their pet's due services (shown under 'Patient – Health Service Reminders.')

Pro tip: If you use PetDesk Texting, create a template to make this even easier. If you don't have PetDesk Texting yet... reach out to your PetDesk Team to learn about purchasing this add-on!



#### PetDesk Animal Hospital ENABLE DESKTO COMPLIANCE REPORT Report Start Date Name or Service Filter by Status May 5, 2024 Client, Pet, or Health Service Type Not-Contacted + Unresolved This report shows all non-compliant clients who received their final Health Service Reminder between May 5, 2024 and May 18, 2024, and non-compliant if they have not scheduled an appointment after 3 weeks of receiving their final Health Service Reminder. The most recer 2024 Client Patient – Health Service Reminders North Star K9 Max Training Patient ID: 113680 (xxx) xxx-xxxx Bordetella Vaccination Due: June 6, 2024 Notified: June 6, 2024 a...@....com Canine Rabies Vaccination (1 year) Due: June 6, 2024 Notified: June 6, 2024 Client ID: NSK91 Greg Ailshie (xxx) xxx-xxxx Patient ID: 5929 a...@....com Credelio K9 (50.1-100lbs) Notified: June 6, 2024 Due: lune 6. 2024 Client ID: 4108 Interceptor Plus K9 (50.1-100lbs) Due: June 6, 2024 Notified: June 6, 202 Keely Algya Ebenezer (XXX) XXX-XXXX Patient ID: 95926 a...@....com 😭 Bordetella Oral Due: June 6, 2024 Notified: June 6.20 Client ID: 40066 Canine Rabies Vaccination (1 year) Due: June 6, 2024 Notified: 😫 Heartworm Test Due: June 6, 2024 Notified: Intestinal Parasite Screen (Fecal Float) Due: June 6, 2024 Notified: June 6.20 😫 Leptospirosis Vaccine Due: June 6, 2024 Notified: June 6, 20 😫 Preventative Care Exam Due: June 6, 2024 Notified: June 6, 20



## How do we use the Compliance Report?

#### **STEP 3: MAKE NOTE OF YOUR CONVERSATION**

- Select the outcome of your call/text/email and enter any notes.
  - Pro tip: Adding your initials can help another team member if they have future questions.
- Outcome options are:
  - **Not Contacted** (default): Client has not been contacted about their overdue pets.
  - **Contacted Unresolved**: Connected with the client, but no action was taken.
  - **Scheduled**: Connected with the client and scheduled an appointment.
  - **Declined Service:** Connected with the client, but they do not want to get services updated.
    - In these cases, it's often best to remove the reminder from the patient chart (depending on your clinic's specific protocol.)
  - No Longer a Client: Client should be inactivated. Perhaps they moved out of the area, but for some reason the client won't be coming back to the clinic.
    - Like with 'Declined Service,' use your clinic's protocol about marking a client or patient inactive.





#### PetDesk Animal Hospital



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## How do we use the Compliance Report?

#### **STEP 4: FOLLOW UP & HELP HEALTHY PETS STAY HEALTHY**

- We recommend checking this report weekly if you're able to, but it can also be used to help fill blank space on the schedule as needed.
- Notes entered in this report will be saved indefinitely until they are updated.
- The more you use this report, the more pets will be in compliance!



# QUESTIONS? **REACH OUT TO YOUR SUCCESS MANAGER**



