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# HOW TO:

## Use the Compliance Report

# What is the Compliance Report?

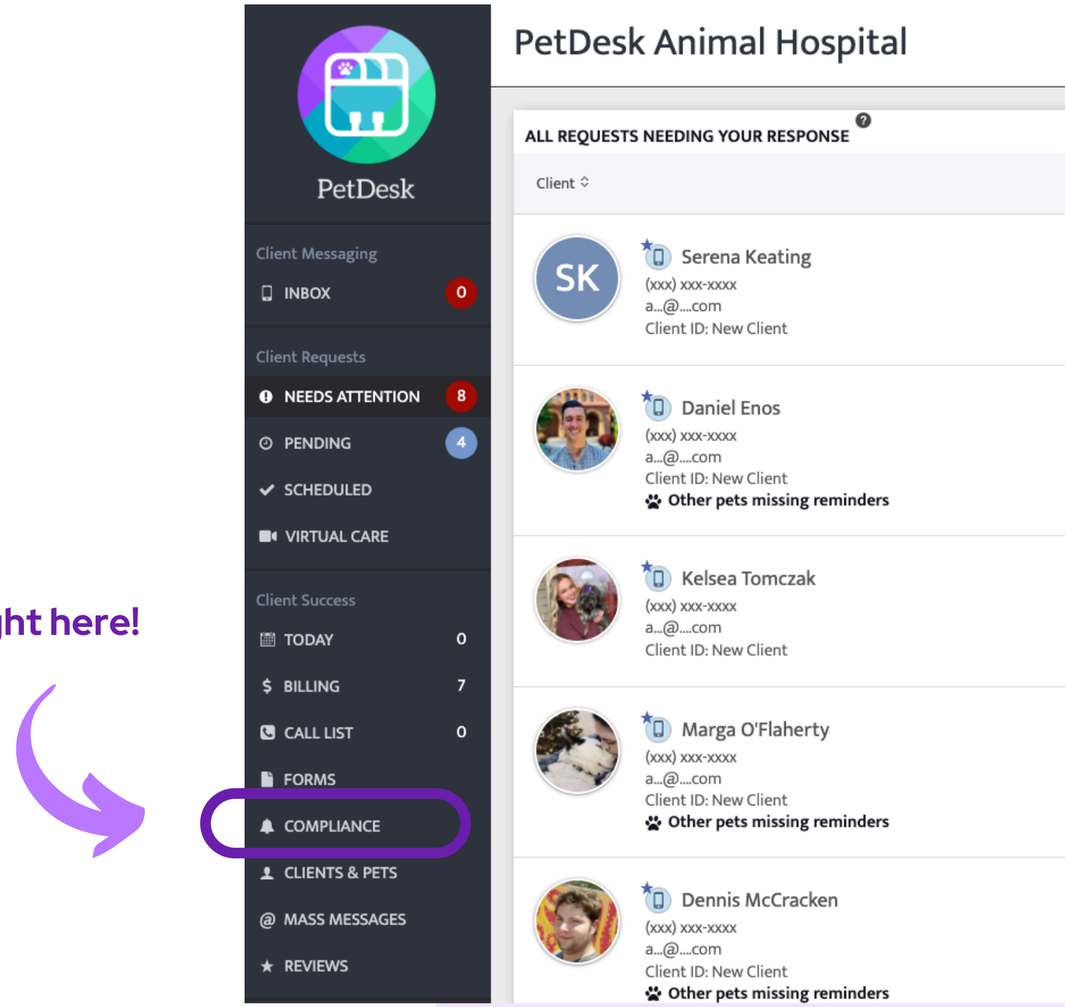
## AND WHERE CAN I FIND IT?

The Compliance Report shows all non-compliant 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!**

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# 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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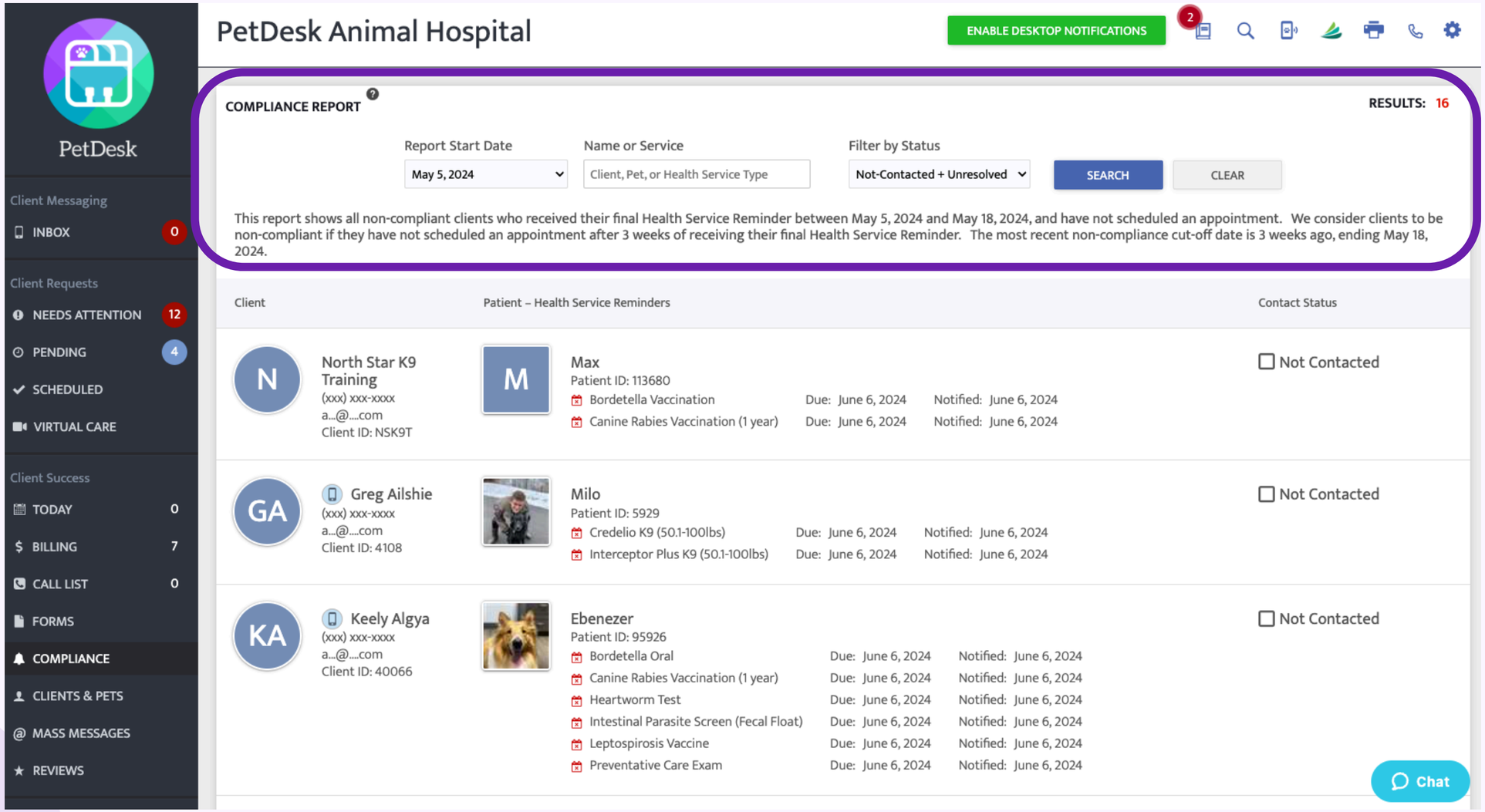
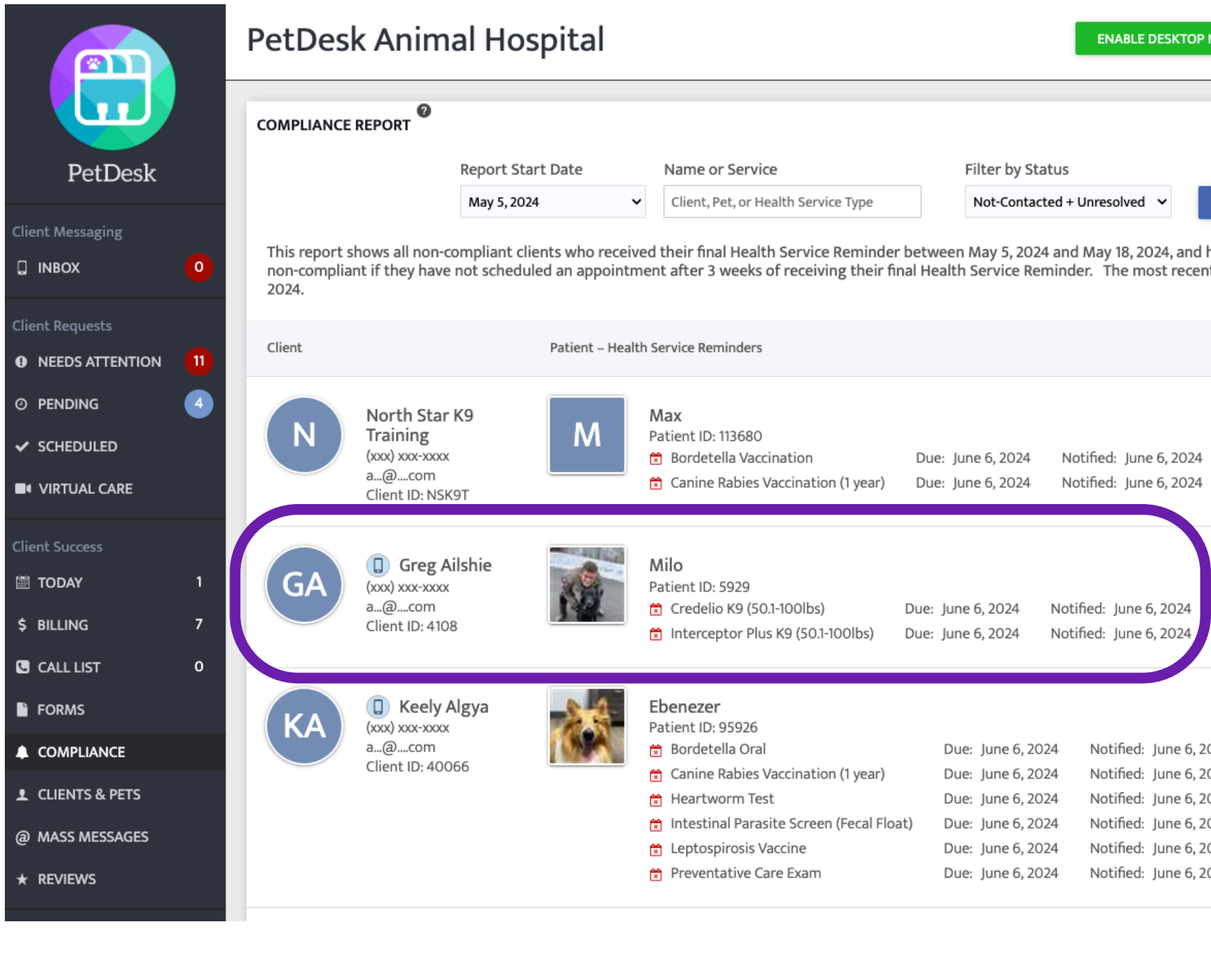

PetDesk
Client Messaging
INBOX 0
Client Requests
NEEDS ATTENTION 12
PENDING 4
SCHEDULED
VIRTUAL CARE
Client Success
TODAY 0
BILLING 7
CALL LIST 0
FORMS
COMPLIANCE
CLIENTS & PETS
MASS MESSAGES
REVIEWS
PetDesk Animal Hospital
ENABLE DESKTOP NOTIFICATIONS
2
COMPLIANCE REPORT
RESULTS: 16
Report Start Date
May 5, 2024
Name or Service
Client, Pet, or Health Service Type
Filter by Status
Not-Contacted + Unresolved
SEARCH
CLEAR
This report shows all non-compliant clients who received their final Health Service Reminder between May 5, 2024 and May 18, 2024, and have not scheduled an appointment. We consider clients to be non-compliant if they have not scheduled an appointment after 3 weeks of receiving their final Health Service Reminder. The most recent non-compliance cut-off date is 3 weeks ago, ending May 18, 2024.
Client
Patient – Health Service Reminders
Contact Status
N
North Star K9 Training
(xxx) xxx-xxxx
a...@....com
Client ID: NSK9T
M
Max
Patient ID: 113680
Bordetella Vaccination Due: June 6, 2024 Notified: June 6, 2024
Canine Rabies Vaccination (1 year) Due: June 6, 2024 Notified: June 6, 2024
Not Contacted
GA
Greg Ailshie
(xxx) xxx-xxxx
a...@....com
Client ID: 4108
Milo
Patient ID: 5929
Credelio K9 (50.1-100lbs) Due: June 6, 2024 Notified: June 6, 2024
Interceptor Plus K9 (50.1-100lbs) Due: June 6, 2024 Notified: June 6, 2024
Not Contacted
KA
Keely Algya
(xxx) xxx-xxxx
a...@....com
Client ID: 40066
Ebenezer
Patient ID: 95926
Bordetella Oral Due: June 6, 2024 Notified: June 6, 2024
Canine Rabies Vaccination (1 year) Due: June 6, 2024 Notified: June 6, 2024
Heartworm Test Due: June 6, 2024 Notified: June 6, 2024
Intestinal Parasite Screen (Fecal Float) Due: June 6, 2024 Notified: June 6, 2024
Leptospirosis Vaccine Due: June 6, 2024 Notified: June 6, 2024
Preventative Care Exam Due: June 6, 2024 Notified: June 6, 2024
Not Contacted
Chat

# How do we use the Compliance Report?

## 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!*

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# 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.

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Client Messaging
- INBOX 0

Client Requests
- NEEDS ATTENTION 11
- PENDING 4
- SCHEDULED
- VIRTUAL CARE

Client Success
- TODAY 1
- BILLING 7
- CALL LIST 0
- FORMS
- COMPLIANCE
- CLIENTS & PETS
- MASS MESSAGES
- REVIEWS

# PetDesk Animal Hospital

ENABLE DESKTOP NOTIFICATIONS 2

## COMPLIANCE REPORT

RESULTS: 16

Report Start Date: May 5, 2024 | Name or Service: Client, Pet, or Health Service Type | Filter by Status: Not-Contacted + Unresolved | SEARCH | CLEAR

This report shows all non-compliant clients who received their final Health Service Reminder between May 5, 2024 and May 18, 2024, and have not scheduled an appointment. We consider clients to be non-compliant if they have not scheduled an appointment after 3 weeks of receiving their final Health Service Reminder. The most recent non-compliance cut-off date is 3 weeks ago, ending May 18, 2024.

| Client | Patient – Health Service Reminders | Contact Status |
|---|---|---|
| N North Star K9 Training<br>(xxx) xxx-xxxx<br>a...@....com<br>Client ID: NSK9T | M Max<br>Patient ID: 113680<br>Bordetella Vaccination Due: June 6, 2024 Notified: June 6, 2024<br>Canine Rabies Vaccination (1 year) Due: June 6, 2024 Notified: June 6, 2024 | ☐ Not Contacted |
| GA Greg Ailshie<br>(xxx) xxx-xxxx<br>a...@....com<br>Client ID: 4108 | Milo<br>Patient ID: 5929<br>Credelio K9 (50.1-100lbs) Due: June 6, 2024 Notified: June 6, 2024<br>Interceptor Plus K9 (50.1-100lbs) Due: June 6, 2024 Notified: June 6, 2024 | ☐ Not Contacted<br>Update status to: Not Contacted<br>Type here to add initials or other short notes...<br>(Max 250 characters)<br>SAVE |
| KA Keely Algya<br>(xxx) xxx-xxxx<br>a...@....com<br>Client ID: 40066 | Ebenezer<br>Patient ID: 95926<br>Bordetella Oral Due: June 6, 2024 Notified: June 6, 2024<br>Canine Rabies Vaccination (1 year) Due: June 6, 2024 Notified: June 6, 2024<br>Heartworm Test Due: June 6, 2024 Notified: June 6, 2024<br>Intestinal Parasite Screen (Fecal Float) Due: June 6, 2024 Notified: June 6, 2024<br>Leptospirosis Vaccine Due: June 6, 2024 Notified: June 6, 2024<br>Preventative Care Exam Due: June 6, 2024 Notified: June 6, 2024 | |

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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!

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# QUESTIONS?

## REACH OUT TO YOUR SUCCESS MANAGER

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