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Best Practices for CSRs with Two-Way

○ **Open the PetDesk Dashboard when you open your Practice Management System (PIMS)**

○ **Check Inbox**
- Ensure frequent, daily use of Two-Way Texting to save valuable phone time. Types of communication best for Two-Way communication include:
  » Negative or WNL lab results
  » Surgical updates
  » Surgical discharge instructions
  » Rx and medication pickup
  » Appointment confirmations, reschedules, and cancellations
- Click on Inbox ➜ Templates
  » The more templates, the better (up to 20) - this is a tool to help the team save time (ie. create a template for the scenarios listed above)
- Users can send/receive pictures, videos, and PDFs through the Inbox!
  » For example: Before & after dental photos keep clients engaged

○ **Needs Attention & Pending**
- Review these tabs to confirm appointment requests are responded to within 1 business day and pending appointments are managed at least weekly

○ **Call List**
- Reach out to clients not marked "Client Confirmed" in the right-hand column

○ **Check the Compliance Report**
- Click the Compliance tab for a weekly report of pets without scheduled appointments 3 weeks after final health service reminder is sent
- Compensate for client cancels or no-shows using this report
- Track who's been contacted and patient status by clicking on the Contact Status box

Don't forget! PetDesk has you covered when clients reach out during closed hours via Two-Way Auto Reply! Let them know you're currently closed, set expectations on when they may hear back, or advise how to handle an urgent situation

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