



chapter 1

Client Service

Customer Service & Phone Etiquette

Client communication and customer service is a cornerstone of a successful veterinary practice. **First impressions** are vital to creating and maintaining relationships with our clients. Often the first interaction with clients is by phone, so creating an immediate connection is important to cultivating a good relationship.

Be sure to acknowledge the client as soon as they arrive. If you are on the phone, make eye contact and gesture to them that you will be right with them. Owners often come in worried about their pets, and it is our job to make their experience less stressful.

Phone Greetings

The phone should be answered within 3 rings. This shows the client that they are a priority. Always answer the phone with a smile!

“Thank you for calling NewDay veterinary clinic! This is <your name>, how may I help you?”

Placing Calls on Hold

Always ask for permission and wait for an answer before placing calls on hold.

“Thank you for calling NewDay veterinary clinic! This is <your name>, is this a medical emergency, or may I place you on a brief hold?”

Scheduling Appointments

Offer the client the next available appointment, or ask if there is a specific day or time that may work for them.

“I can certainly schedule Jackson for an exam with the doctor to have his ears checked! My next available appointment is tomorrow at 1pm. Does this work for you, or is there a specific day you would like me to check?”

In general, we should strive to book appointments for as soon as possible, including same-day if feasible. Always offer clients a same-day option if the schedule allows. Additionally, make every effort to book a client’s next appointment during check-out. Booking the pet’s next appointment at checkout ensures they have their time reserved. This keeps the pet on schedule whether it is for a recheck or for preventative care. Ideally, we would want the majority of our clients to always have their next appointment on the calendar, even if its six months away.

When Scheduling, Make Sure to Always:

- Add the appointment to the veterinary clinic schedule with details

- Collect all owner information and patient information (new patients only)
- Create Gingr account (new patients only) and select relevant slots in Gingr

Also Complete the Following for Great Service:

- Give the clinic’s address and, if needed, driving directions
- Give individual instructions, such as bringing a stool sample or fasting the pet
- For new clients, request if they can bring previous medical records, or collect previous vet’s information to call for the medical records

Helpful Phone Scenarios

Remember – It is always better to place a call on hold and ask a technician or the DVM for assistance, than to give incorrect information. It is ok to say “let me find out for you” or “do you mind if I take your information and call you back?”

SCENARIO 1

Placing a caller on hold when you need to consult a Veterinarian or Technician

A client calls to request a medication refill for Fluffy Sparkle, but the refill requires approval. Dr. C is in a room with a client (we know he can talk), and your technician is in the play yard observing a pet. What should your response be when you need to wait for approval for a medication?

SOLUTION:

Mrs. Sparkle, it may take me a few minutes to talk with Dr. C, as he is in a room with client. Would you like to continue to hold, or would you like me to call you back? What is the best number to reach you? We also have the option to text you if that would be more convenient. This solution offers the client the option to continue to wait or have a more convenient call back.



SCENARIO 2

Caller insists on getting an appointment today!

Mrs. Sparkle calls and wants an appointment with Dr. C today. However, you know Dr. C's schedule is fully booked. What should you do?

SOLUTION A:

1-doctor practice, drop-off or work-in

I'm sorry Mrs. Sparkle, but Dr. C is fully booked today. However, you can drop Fluffy off before 12pm and the doctor will examine him between appointments. Once examined, we will call you with the doctor's recommendations and what time you can pick him up. We could also work you in at 1pm, if you do not mind waiting to be seen between our other appointments. Would either of these work for you?

SOLUTION B:

1-doctor practice, alternate day

I'm sorry Mrs. Sparkle, but Dr. C is fully booked for the rest of the day. However, he has an opening tomorrow at 10am. Would this work for you?

SOLUTION C:

2-doctor practice

I'm sorry Mrs. Sparkle, but Dr. C is fully booked for today. However, Dr. Z can you see Fluffy at 2pm today. Does this work for you?

Each DVM may have different preferences for work-in appointments, so be sure to check with your doctor!

Remember, you can never give medical advice by phone to a client. Consult the DVM or Technician when in doubt!

Abbreviations

The following abbreviations are commonly used in veterinary medicine. Becoming familiar with them will allow you to understand the doctor's orders and explain them to the client correctly.

O	OWNER	Q	EVERY (Q2H = every 2 hours; Q12H = every 12 hours, etc.)
Rx	PRESCRIPTION	HWU	HEALTH WRITE UP
SID	ONCE daily, think single (abbreviation of Semel in die)	AS	LEFT ear
BID	TWICE daily, think bi for two (abbreviation of bis in die)	AD	RIGHT ear
TID	THREE times daily, think three (abbreviation of Ter in die)	AU	BOTH ears
QID	FOUR times daily, think quad (abbreviation of quarter in die)	OS	LEFT eye
PRN	AS NEEDED or WHEN REQUIRED (abbreviation of pro re nata)	OD	RIGHT eye
PO	BY MOUTH, think per oral (abbreviation for per os)	OU	BOTH eyes
NPO	NOTHING BY MOUTH (nothing per os)	HR	HEART RATE
		RR	RESPIRATORY RATE
		CRT	CAPILLARY REFILL TIME
		MM	MUCOUS MEMBRANES

When writing the instructions for a prescription label, always ensure to have a system of double checking the instructions. Check the medication name and dose to ensure they are exactly what the doctor ordered.*Also make sure the patient and client name are correct.

The label must include:

- The route of administration (oral, topical, in the ear, etc.)
- How much to give (one tablet, one cc, ½ tablet, etc.)
- The frequency (every 8 hours, once a day, etc.)

Some medications have special instructions, such as **with food, before food, keep refrigerated**, or more – so make sure to check if any of these apply to your label!

See the below examples to get familiar with how directions are commonly typed up:

- Give 1 tablet by mouth twice a day with food.
- Give ½ tablet by mouth once daily until gone.
- Give 0.5 cc by mouth every 8 hours with food. Keep refrigerated.
- Instill 8 drops into the right ear twice daily for 7 days.
- Apply a thin layer topically to affected area twice daily.

Flea, Tick & Heartworm Prevention

Monthly preventatives can vary depending on which state or area you live in, but in general all dogs and cats should be on a monthly HEARTworm prevention which protects against heartworms and intestinal parasites in addition to a monthly flea/tick prevention. Alternatively, “all in one” products are also an option which cover for heartworms, intestinal parasites, fleas, +/- ticks in a once monthly oral or topical treatment.

Each veterinarian may have different products they recommend, so be sure to check with your doctor for their preference!

These products should be offered at each visit to ensure compliance. Preventative medicine is better for the pet than treatment – and cheaper for the owner.

Monthly preventions come in two forms: oral chewable tablets and topical liquid placed on the skin.

Common brands include:

Simparica Trio: fleas, ticks, heartworms, roundworms, and hookworms. Dogs only.

Bravecto: fleas and ticks. Dogs and cats (given every 90 days instead of 30!).

Heartgard: heartworms, hookworms, and roundworms. Dogs and cats.

Revolution: fleas, ear mites, heartworms (dogs and cats); sarcoptic mange and ticks (dogs only); hookworms and roundworms (cats only).

Revolution Plus: fleas, ticks, heartworms, ear mites, round worms, and hookworms. Cats only.

Wellness Plans

NewDay veterinary clinics offer preventative care plans called **Wellness Plans**. The plan covers routine and preventative care such as vaccines, fecal tests, and office visits.

NewDay offers three levels of plans to meet each pet’s needs: **Core**, **Vital**, and **Premium**.

It is important to explain to owners what is included in the wellness plan at sign-up, and how payments and cancellations work. The wellness plan offers a 5%, 10%, or 15% discount on any services not included in the wellness plan.

Be sure to differentiate from insurance, which reimburses owners for accidents and injuries.

The wellness plan is a 12-month agreement. A \$48 enrollment fee and first month’s payment are due at sign-up and collected in clinic by the veterinary team. Owners are then charged monthly on the 15th, for 11 more payments.

Three Options to Fit Your Pet’s Lifestyle

Visit our veterinary team and choose a plan to fit your pet’s needs and lifestyle. With monthly payments of \$38, \$52, or \$66, our customizable plans offer preventative care for your dog or cat.

All plans require a one-time membership fee of \$48.

	CORE \$38/MO	VITAL \$52/MO	PREMIUM \$66/MO
Free Days of Day Camp or Nights of Boarding per year	2	4	6
Connected Care: Virtual Exams	2	4	6
Savings on All Additional Services and Prescriptions/Medications	5%	10%	15%
Unlimited Office Visits	■	■	■
2 Intestinal Fecal Exams	■	■	■
3 Routine Dewormings	■	■	■
Heartworm Test*	■	■	■
FVRCP Vaccines and Leukemia/FIV Tests**	■	■	■
Ear Cytology	■	■	■
Skin Cytology	■	■	■
Interstate Health Certificate	■	■	■
Rabies, Distemper, Parvo and Bordetella Vaccines*	■	■	■
Leptospirosis, Influenza and Lyme Vaccines*		■	■
Camp + Care		■	■
Leukemia Vaccine**		■	■
Urinalysis		■	■
Blood Work		■	■
Electrocardiogram			■
Blood Pressure Check			■
Pulse Oximetry			■
1 Professional Dental Cleaning, 1 Spay/Neuter or 1 Radiology Study			■

*Dogs only. **Cats only.

How to Sign Up a Wellness Plan:

- Log into VCP (Veterinary Care Plans)
- Select “Wellness Plans” from the top left corner
- Select plan (Canine or Feline / Core, Vital, or Premium)
- Fill out all information in the form

Be sure to inform owner of the following regarding payment:

- Credit Card will be drafted monthly payment on the 15th
- Owner is responsible for updating Credit Card
- There is a \$25 late/failed payment fee
- VCP will reach out if a payment is missed

- Select “Print Agreement”
- Print 2 copies of the contract:

One for the owner to keep for their records and one for the owner to sign that the clinic will retain.
- Scan signed copy of wellness plan agreement and save to the patient’s file
- **Select “Complete” after signing, or the wellness plan will not be started!**

Adding Wellness Plan Icons to Gingr Account:

- Locate the pet’s account in Gingr. Select the “+” next to their name
- Add the heart icon with the plan type and date signed up (“PREMIUM 11/10/21”)
- Add the purple Camp & Care icon for Vital/Premium plans, and Camp & Care price (“\$25 Camp & Care”)

Vet Services



fig. 03 Vet services dashboard

Wellness Plan

fig. 01 Veterinary Care Plans (VCP) Wellness Plan button from dashboard

1

Print Agreement

2

Complete

Akira +

fig. 02 Select “+” next to pets account name in Gingr

Adding Camp/Boarding Packages to Gingr Account:

- Select the barcode icon on the left-hand side
- Select “Sell Retail & Packages” (first drop down option)
- Select the appropriate package (core, vital, or premium) and add to cart

Wellness Plan | Core
Day Camp | Camp & Care
\$0.00
[Add to Cart](#)

Wellness Plan | Premium
Day Camp | Camp & Care
\$0.00
[Add to Cart](#)

Wellness Plan | Vital
Day Camp | Camp & Care
\$0.00
[Add to Cart](#)

- Add the correct owner (be sure to double check first and last name!)
- Select “Check Out With No Payment” in bottom right corner
- Add owner-visible note (ex: ‘Premium WP Resort Credit’)
- **Camp and boarding package has been added to the account!**



fig. 04 Barcode icon from Gingr dashboard

How To Take Payment – Gingr

Payments for veterinary services are taken through the resort’s software called Gingr. Follow the below example to check patients in and add charges to their account.

- **Step 1** – If the patient is here for only veterinary services, you can use Quick Check In. Search for patient and select “Add.” *Gingr has many patients with the same name, so be sure to check the owners first and last name, and the pet’s breed, all match to avoid checking in the wrong patient! If the patient is already checked in for boarding or day care, skip to step 2.



- **Step 2** – Find patient under the green tab “Checked-In,” and search for the patient. Select the three vertical line drop down menu, and select Edit Reservation.



- **Step 3** – Select “Additional Services,” and select “Vet I Pet Paradise Vet Services”



- **Step 4** – Select the correct date from the “When” drop down menu. Choose appointment date and click the green block. “Save & Close,” and “Override and Create” if needed.

Vet | Pet Paradise Vet Services \$0.00

Description

Wellness Services for our guests include:

- * Vaccinations
- * Wellness Exams
- *Dental
- * Medications

Price

0.00

Notes

Did you fill out the Veterinary Admissions Form (if dropping off and needing Vet Services) or Did you want to leave a deposit in the event your pet needs veterinary services to keep them comfortable during their stay?

Has anyone spoken with you about our Wellness Plans?

Does your pet need any heartworm, flea/tick

Service Options

No options are available for this service.

When?

Choose an Appointment Date

Tue, Apr. 26th

Duration

60

Last Step

Choose an appointment time

Coconut Creek Vet Services

11:00 AM
0 / 1 Booked

- **Step 5** – Back under the green “Checked-In” tab, click Vet I Pet Paradise Vet Services and enter the amount the owner should pay. To check out, click the cart icon on the left. From here, you can check out with payment.

Actions	Animal	Owner	Type	Lodging	Report Card	Services	Start	End
	Sasha (Owner)	Peterson, Nicole	Vet Vet Services Visit			Vet Pet Paradise Vet Services Coconut Creek Vet Services	Tue, 04/26/22, 12:01 PM	Tue, 04/26/22, 1:00 PM

Service	Price	Actions
Vet Pet Paradise Vet Services	0.00	

Don't forget to ask the owner if they want a copy of their payment receipt printed or emailed!

This manual is an basic overview of some of the tasks used daily in the clinic. Not everything could be covered in this edition. Look for this to be updated and expanded in the future.



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