

# CURBSIDE WORKFLOW FOR VETERINARY PRACTICES



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## GENERAL SUGGESTIONS

Mark a “star” next to suggestions you want to implement and a “checkmark” next to suggestions you are already doing.

- Place LARGE sign on the door that says: “STOP – employees only beyond this point.”
- Number parking spaces - Veterinary teams do not know automobile brands. This eliminates confusion. Fun Idea! Instead of numbers use animal pictures with the names under them. “A” Ant, “B” Baboon, “C” Cat...
- Tell clients is it imperative to have their cell phone for two-way communication and to anticipate a call or text from the team while they are waiting.
- Invest in an app that allows you to text message your clients through the landline. VitusVet, ZipWhip, and PetDesk are a few who do this. You can also utilize telemedicine companies like AirVet, Televet or VetNow to manage texting. Weave telephone system also allows for texting and recording authorization for care over the phone.
- If serving a new client, it is a nice idea to send a “hello” video from your doctor to virtually meet the client. The app Bonjoro allows you to email a video to anyone.
- Create “runner” position to transport patients back to the car after checkout
- Encourage “drop off care” and set intake and discharge appointments.
- If you don’t have kennel space, use exam rooms with temporary cages to store patients waiting for exams. This frees up your runners or assistants for other duties
- Prep and clean at least one exam room for euthanasia or dire emergency cases where clients may be allowed into the building. Preferably near the front door.
- Set up a shelter outside for drive thru medication and food pickup if traffic for these items is heavy.
- Buy golf umbrellas for staff runners.
- Set up a contactless payment platform that allows you to text invoices like VitusVet. Some credit card providers like Pay Junction or Gravity Payments allow you to email invoices for email signature capture for remote pay.

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- If doing remote pay – cover the device in a clear plastic bag which can be disposed of or wiped down with alcohol between clients. Alternate – supply clients with thin food service gloves for signing.
- Contract for a port-o-potty in the parking lot for clients to use while waiting curbside.
- Negotiate with nearby restaurants or fast food to give coupons to waiting clients as a “prize”.
- Some clinics are playing games for prizes, showing educational videos, or giving cups of ice-cream, coffee or hot cocoa to waiting clients.
- Prep clients for a realistic wait time ask them to bring something to do. You can prepare a document of fun, informative videos to share with clients to occupy their time such as this one: <https://fearfreehappyhomes.com/courses/how-to-prepare-your-pet-for-vet-visit/>
- Prepare to offer clients bottled water, hand sanitizer, masks if allowed inside for “euthanasia”.
- Prepare documents to be emailed that typically are signed in house such as surgical consent, boarding consent, grooming consent, new client information, confirmation of current address and phone numbers, health questionnaires. These documents can also live on your website as a link sent to be sent to clients.
- Explain to New Clients that their appointments will not be confirmed until the client fills out new client questionnaire to reduce “no shows”.
- Many practices are requiring prepayment of the exam fee for all new clients.
- Prepare a previsit protocol document that explains the changes in protocol, tells clients to program the practice number into their phone so they don’t think it is spam, to be prepared to answer their phone when the doctor or technician calls and to utilize text messages when at all possible for speed of response.

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- Inform clients to prepare pet for transport by bringing cats in a carrier and dogs on a leash or harness that is fitted well to avoid escape. Bring pets hungry so the team may offer treats. Play classical or other calming music on the car radio to relax the pet. If pets are typically anxious, have the client call the practice for previsit protocols or medications to reduce anxiety.
- Send a link to clients from the Fear Free Happy Home website instructing them on how to prep a cat to acclimate to the carrier. <https://fearfreehappyhomes.com/your-cats-vet-visit-begins-at-home/>
- Create a “here is how a visit goes inside the office” video to share with clients who want to know.
- Include photos in your documents! The human brain remembers only 10% of what it hears but when accompanied by a picture that comprehension increases to 65%. So when you send a picture of your marked parking spaces, a person talking on a cell phone, or your team getting pets from the car, clients are much more likely to remember and follow your instruction.
- Repetition is also a key to memory so keep that in mind for all client instructions.
- Some practices are utilizing tablets and zoom to create real-time virtual exams for their patients with their clients attending. The client is given a tablet with the zoom meeting already open when the runner goes to retrieve the pet. The doctor has another tablet with the zoom meeting open and performs the exam while being videoed meanwhile discussing findings with the client just like as if they were in the exam room. When the exam is over , the runner will return the pet and retrieve the tablet while collecting payment. This speeds up the workflow.

# STEP BY STEP PLAN FOR ROUTINE VISITS FRONT DESK

Feel free to use the “Notes” section to record thoughts on how to implement the routine visit plan.

## 1. OWNER CALLS TO REQUEST CARE

Client is greeted in a friendly tone or manner otherwise appropriate to the situation (empathy for illness or euthanasia), connection is made with the client using a conversational remark before jumping into “business”.

### If current client:

1. Patient history is reviewed.
  2. Address and client info confirmed.
  3. Patient needs are explored.
  4. Information is given about **appointment scheduling**.
  5. **Curbside care instructions are discussed.**
  6. Email address is confirmed to send the client a link to fill out your online forms and patient history form.
- \* Telehealth option: Front desk triages calls to see if suggesting a telehealth “visit” would be appropriate. If so, the appointment is scheduled within the telehealth platform.

### If New Client:

1. Client is welcomed.
2. The patient’s need is reviewed.
3. Information is given about **appointment scheduling**.
4. **Curbside care instructions are discussed.**
5. Email address is obtained to send the client a link to fill out your online new client forms and patient history form.
6. Prepayment is accepted for the exam if “no shows” have been a problem. To reduce the length of the phone call, send a text with a payment link to let the client easily enter their card details.
7. Client is asked if they are familiar with location or need directions?

## NOTES:

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## 2. APPOINTMENT IS SCHEDULED WITH APPROPRIATE TIME ALLOCATED FOR CARE DEPENDING ON NEED.

### Suggestions:

- Well pet – 30 minutes
- Sick pet – 1 hour
- Puppy/ Kitten 1st visit – 1 hour
- Puppy/Kitten series #2 and #3 – 20 minutes with tech if allowed by state practice act
- Urgent care 1.5 hours or admit for workup as drop off
- Euthanize – 1 hour and determine if O will be allowed in the building with the pet

## 3. OWNER IS EDUCATED ON NEW PROTOCOL

- Park in numbered space and note the number
- Bring mobile phone.
- Bring something to do – appointments take longer than normal
- Fill out previsit form.
- Place pet in back seat of car or (meet the staff member halfway when called).
- Pet to be retrieved on passengers' side to avoid close contact
- Request Owner wear mask when interacting with staff.
- \* If a euthanasia and client is allowed in building: explain one person in and must be masked, also confirm health status of the owner.
- \* During intense cold weather some practices have clients meet them at the front door with the pet rather than running to the car.

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## 4. PHONE CALL IS ENDED

- Client is assured pet will be well handled by the team.
- Client is informed to watch email for a document with protocols as discussed.
- Client is thanked for calling and reminded to call or text upon arrival.

## 5. OWNER IS EMAILED NEW CURBSIDE PROTOCOL AND PREVISIT QUESTIONNAIRE

- Possible give a \$5.00 instant account credit or loyalty point for completed questionnaire.
- Owner is also emailed link to how to transport a pet from Fear Free Happy Homes or CATalyst website and previsit tips are given (bring hungry, etc.).
  - <https://fearfreehappyhomes.com/>
  - <http://catalystcouncil.org/resources/video/>

## 6. CLIENT IS EMAILED OR TEXTED AN APPOINTMENT CONFIRMATION

2- 3 days prior to appointment or called 2 days prior if text is not available. Again, the protocols are reviewed, and the client is told to call upon arrival. If the questionnaire has not been filled out, the information is once again requested.

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## 7. OWNER ARRIVES:

1. Owner calls or texts CSR team to signal arrival.
  2. CSR confirms appointment details, reviews patient needs, and reviews previsit form has been received.
  3. Runner or Tech is alerted Owner is in parking lot with pet in parking space # \_\_\_ in ABC model and color of car.
  4. Tech is assigned to the patient and is responsible for communication with client until time for CSR to accept payment.
  5. When tech goes to car, she carries the health questionnaire if received, if not, she takes the health questionnaire and fills it out while at the car.
- \* Alternate: A "runner" is sent to the car to retrieve the pet while the tech calls the owner to review the questionnaire or take history.
  - \* Alternate: A tablet is shared as described above with the client and the pet is retrieved.

## 8. TECH AND DVM

- Review patient history, examine patient, create estimate, call client to review and email copy to client to review.
- \* Alternate: This is performed live over Zoom and tablet.

## 9. GET VERBAL CONFIRMATION TO PROCEED

- \* Note: It is possible to use the DocuSign app to capture client signature if this is considered necessary.
- Client is instructed to be available and on alert for a call from the team to discuss a care plan for the pet.

## NOTES:



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## 10. TREATMENT IS COMPLETED PER CLIENT AUTHORIZATION

Client is called if during treatment any further discussion is needed either by the DVM or Technician. If desired the practice can video the exam and followup instructions and use the Bonjoro app to send it to the client.

## 11. PET IS READY TO BE DISCHARGED

When the pet is ready to be discharged the CSR is informed and the invoice is finalized, medications are filled.

## 12. PAYMENT

- The CSR sends a text or email to accept paperless remote payment, or calls the client to accept payment by phone. If a follow up appoints needs to be scheduled it can be done at this point.
- Once the payment has been processed, the invoice is texted, emailed or printed, and the pet is returned to the client by the runner or technician who will explain how to give any medications and deliver any take home instructions.

## 13. THE CLIENT IS THANKED FOR THEIR BUSINESS.

## NOTES:

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## 14. THE OWNER DEPARTS.

This plan can be modified for surgical case admissions by adding in the time to confirm the procedure to be performed with the client. If a lump is to be removed, have the client make a mark on the pet with a sharpie, confirm the pet has been fasted and then inform the client when to return for patient discharge.

For Euthanasia, it is suggested that the client pay prior to the procedure after discussing the plan for the event and aftercare for the body with the appropriate team member. Unless urgent, schedule for the last appointment of the day if possible so the clients who are allowed to be with their pet can take their time and when they depart the room can be thoroughly cleaned and disinfected. Many hospitals are offering outdoor euthanasia if an area is available to reduce exposure to the team. Some are allowing clients to view through windows rather than admitting clients to the building, but most are allowing one client at least to be with the pet.

As Fall and Winter approach practices should be planning ways to protect their teams from the elements. Outdoor patio heaters at “hand off” areas, purchasing outdoor walk off mats to place on icy sidewalks for staff and patient traction, purchasing down parkas in clinic colors for runners, increasing patient drop-off care to allow clients to leave and return. Offering clients warm beverages like coffee or tea is a nice customer service idea on cold days.

**Planning ahead now prevents scrambling for solutions on the first snowy day.**

## NOTES: