

Vetech View

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Stay in touch with Recalls

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Many clinics are in the habit of following up with clients via telephone for situations such as: post-surgery or patient follow up, short term vaccination notices for puppies and kittens, checking on a patient after a recommended diet change, etc. Advantage makes managing these client recalls an easy process.

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Recalls are typically used for short term (less than 6 months) staff notices. As opposed to reminders which are typically long term (over 6 months) and are generally printed on postcards. Advantage offers a few different ways of creating recalls. These will be discussed in this article along with printing the recall report and closing recalls.

Recalls From the Client or Patient Window.

Both the client and patient window have a Reminder & Recall tab. Reminder information is displayed on the top of this window and the recall section is on the bottom of this window. From here you can manually add, edit, or remove recalls

Maintain Recall Window

To setup a new recall, click the  symbol on the lower right of this window. The New Recall window will be displayed. In the description field you can type in the recall description or click the icon on the right side of this field to display your pre-defined list of recall messages. This list is setup from the Lists/Recalls/Recall Notes menu. Next select the number of days from today for the recall, select a staff member if you want and click the OK button to save this recall. This new entry will now show up in the recall list.

Adding a Recall during an Invoice

You can quickly add a new recall during the invoice process by clicking on the Recall icon on the invoice toolbar. This will present you with a recall window very similar to the recall window accessed from the client or patient window.

Thought for the day: If the grass is greener on the other side of the fence, you can bet the water bill is higher.

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Tying a Recall to a Treatment or Inventory Item

You can also automate the creation of recalls by tying a recall to any treatment or inventory item. With this method, any time you invoice for a service that has a recall setup for it, Advantage will automatically add an entry to the recall list. To setup a treatment or inventory item for a recall, edit that item and click the Recall icon in the top left of this window. The following window will be displayed.

Description	Days
Post Operative	4

Recall window for Treatment

Click the Add button and select a recall message and number of days. In this example an entry will be added to the recall list four days after the service is invoiced.

Calling Clients Back

To make recalls work you have to maintain your recall list on a regular basis. This is done by printing the recall list report and updating the recall data for clients that have been called.

To print the recall report, go to Reports/Clients/Recalls and select the date range you desire. The recall report displays the client and patient name, client home and work phone numbers, the recall date, and the recall message for each entry.

After you call a client, you should edit the recall, enter the date called, staff person who called, and change the recall status to "closed". This way you will have a record of when the client was called back. By setting the recall status to "closed" the recall will not be displayed on the recall report or on the screen unless you uncheck the "Active Only" box on the recall window.

Ok, here is a corny one...

Two roads were in the tavern, a Freeway and a Farm Road, and they were chatting at the bar.

The Freeway says to the Farm Road, "I'm the hardest, meanest, toughest road there is. I've got the highest speed limit, I have the most lanes and I carry the greatest volume of traffic. I'm as hard as nails, me."

The Farm Road says, "Yea, but I'm the back-bone of the country. There's many times more miles of Farm Road than Freeway. I go everywhere from countryside to city, big town and small town, and in total I carry more cars than any other road. I am the undisputed heavyweight champion of roads."

Then a small pink road walks up to the bar and orders an orange juice and lemonade. The Freeway and Farm Road immediately go quiet, and stare at their drinks, desperately trying not to catch the attention of the small pink road that gets his drink and goes and sits in the corner.

The bartender says to the Freeway and Farm Road: "I thought you were the biggest, baddest, toughest and best roads in the country!"

And the Freeway replies: "Yeah, but you don't want to mess with him -- he's a cycle path."

Summertime Schedule:

Please make a note that Vetech will be closed
May 26 for Memorial Day and July 4 for Independence Day.

