SPCA FLORIDA
MCCLURG ANIMAL MEDICAL CENTER

Customer Service Protocol Manual

A Guide to Excellent Customer Service

Last Modified

5/8/2011

Table of Contents

Introduction

This manual is divided into sections for organizational purposes and many sections overlap. A McClurg Animal Medical Center customer service representative (CSR) will need to comprehend and master all phases regardless of which area one might be assigned. There is much to know and it is critical that correct and accurate information be shared with our clients. If you do not know or are unsure of an answer then refer the question to a more experience CSR.

DO NOT PRETEND TO KNOW WHAT YOU DO NOT KNOW!!!

Giving bad information at a minimum will destroy our credibility and at worst could cost the life of a patient. Even if you think you know an answer and your information source was not a trusted source at the McClurg Animal Medical Center then again, refer the question to someone in the know.

Training Protocol

Week 1 and 2

- New employee should know how to greet each client that comes into the facility.
- New employee should know how to admit new client into Avimark.
- New employee should know how to check in clients who have appointments.
- New employee should know how to check in clients who do not have an appointment.
- New employee should know how to charge exams, rechecks, and surgical rechecks correctly.
- New employee should know how to check out surgery patients in the afternoon including medications, certificates and microchips.
- On week 2 the new employee will review and work on being competent in what he/she has learned.

Week 3

- New employee should know how to open the front office.
- New employee should know how to check in surgery patients.
- New employee should know how to invoice all surgeries for the day.
- New employee should know how to process the paperwork after surgeries are completed.

Week 4

- New employee should know how to process heartworm treatment patients.
- New employee should know how to

Training Series Videos:

LifeLearn

- Communication Matters –
- Teams That Work –
- Enhancing Your Telephone Skills –
- Cornerstones of Compliance –
- Essentials of Client Service –

Avimark Training Videos

- Client Information Display –
- Medical Condition Record –
- Dental Chart –
- Diagnosis List –
- Appointment Calendar –
- Follow-up List –
- Boarding Calendar –
- Posting & Invoicing –
- Whiteboard -

GENERAL PROTOCOL

Exam Charges

Our goal is to provide the best medical care for our clients. In doing so we must charge an exam fee.

Exam Charges:

- This fee will be charged anytime a Veterinarian goes into a room to speak with an owner.
- This fee will be charged anytime a Veterinarian goes into a room to see a client (Pet).
- If a client needs a consultation with the Veterinarian there will be a fee. If the consultation is under 15 minutes then there is no charge for the consultation. However you will need to go in under their name and put the consultation code in Avimark use code # cnsult. If the consultation is longer than 30 minutes you will charge a consultation fee. The amount of the fee is in Avimark under Consultation fee/no exam use code # cnsultwf.

Recheck Charges:

- A recheck fee applies only if it is *within 30 days* from the original exam. Recheck fees apply only if it is the *same complaint* the client originally came in to be examined.
- An exam fee will be charged if a client comes in with a different symptom, even though the client may have been seen within the 30 days. It would not be a recheck due to the fact that the pet was brought in for something different.

Surgical Rechecks:

- When surgical rechecks have returned for their visit we need to look at the estimate that was given to see how many rechecks were charged into the estimate. Anything above the number of rechecks will need to be charged to the client (ie: estimate has 2 surgical rechecks charged, but the client is on his 3rd recheck at that point we would charge a surgical recheck fee of $17.00 each visit after that only for that particular surgery)

Script For Obtaining Email Addresses

We are always looking for ways to keep our costs of services to a minimum and one way we can do that is to send vaccination and exam reminders by email to save the cost of printing and postage. Email addresses are never sold or shared. Do you have an email address you would like for us to add to your file?

Transfer of Records

From time to time we have requests to transfer pet records for a client. We should honor that request and need verification of authenticity prior to the transfer. We must be careful to protect the owner's privacy and to not send out records without the proper authorization. Here are some guidelines to follow:

- There is a new service code called "Request for Transfer of Medical Records". When posted this code will create a merged record transfer document.
- If the client is face to face then ask them to sign a "Request for Transfer of Medical Records" form and verify their identity with presentation of a driver's license or a valid ID card.
- If the client is not face to face or if another veterinary office calls for records then get the appropriate destination information such as email, fax number or mailing address and tell them that we are happy to comply as soon as we have a validated request of transfer from the owner and if appropriate ask them to notify the owner so they can make the request.
    - The owner then should complete the "Request for Transfer of Medical Records" and get it back to us. If for some reason the client cannot stop by our office to sign the form and they don't have a fax or email to receive the form etc then use the conference function on the phone system and have another staff member listen in to verify the authorization. Next a note is to be created in Avimark by using the "Request for Transfer of Medical Records" code and attach a note to it validating the authorization including the names of the two witnessing staff members.

Heartworm Protocol for Front Desk

Heartworm Treatment Protocol

Heartworm treatment as well as compliance by the client is imperative for the wellness of the patient.

Heartworm patient check-in

- Check schedule for the next day to see what heartworm patients are scheduled.
- Patient chart should be pulled out of the filing cabinet the night before or morning of treatment.
- The morning the patient is scheduled to come in, choose the heartworm phase that is to be done that day.
- Charge according to the phase level the pet is on for that day.

- Check to see if a payment is due. If payment is due you will take the payment that is scheduled for that day's treatment. (If the client does not have payment and payment is due we can not start treatment for that day.)
- If the client has paid his bill in full then you would charge according to what phase they are on and then post it out.
- Print 2 copies of the invoice. One copy is for client and one copy is for the chart. Then print a patient chart as well, and place in pet's folder.
- Schedule next appointment for treatment according to the heartworm phase sheet.
- Make sure the patient folder has a heartworm treatment record form. Fill out the top of sheet and place on the front of chart.
- Inform a technician that we have a pet to be checked in for heartworm treatment. Then place the chart on the back counter for a technician to check the pet in to the hospital for treatment.

Heartworm Treatment Phases

- For phase 1 "Heartgard" (Heartworm preventative will kill migrating larvae)
- For phase 2 "Doxycycline" & "Heartgard" (Antibiotic helps to weaken adult worms)
- For phase 3 "Immiticide", (Day stay) Pick up will be at 4:00pm
- For Phase 4 "Immiticide", (Overnight stay) Pick up will be the next day at 4:00pm
- For Phase 5 "Heartworm Test" (Office visit fee - price not included in treatment)

The Heartworm Treatment process takes a total of four months

Patients must remain very calm throughout entire Immiticide Treatment!!

Phase 1: Patient is to be given Heartgard every 30 days for a minimum of 2 months before beginning treatment for the adult worms. (Not to be given within 3 days before or after Immiticide treatments). An appointment should be made for 2 months for phase 3. Dispense Doxycycline at this time.

Phase 2: Doxycycline will be given for one month prior to receiving any Immiticide treatment, Doxycycline should start 4 weeks (28 days) from date of first Heartgard dose.

Phase 3: This is a day stay. Drop off is at 7:30a.m. Take payment, and schedule an appointment for four weeks for phase 4. (Inform client of the importance of keeping pet very calm, leash walking and putting dog in crate is highly recommended.)

Phase 4: This will be an overnight stay. Drop off time is at 7:30 a.m. Take payment and schedule an appointment for 6 months for heartworm test. Also, sell a 6 month supply of heartworm prevention at this time.

(Inform client of the importance of keeping pet very calm, leash walking and putting dog in crate is highly recommended.)

Heartworm Prevention

Heartworm treatment patients should be started on Heartgard at the beginning of treatment and repeated every 30 days until treatment is done. (Not to be given within 3 days before or after Immiticide treatments)

A snap test will be performed six months after the final Immiticide injection and if negative an additional 12 months of heartworm prevention can be approved.

Annual heartworm testing is scheduled thereafter.

The fee for the heartworm treatment does not include the preventive after the final injection or the required snap test at 6 months post treatment.

Payments

The total cost of the heartworm treatment is based on the weight of the dog. We prefer complete payment of treatment but we will accept a payment of half down when the Heartgard and Doxycycline is dispensed then the balance is to be paid before the first Immiticide injection is given.

Adoption heartworm patients

- Before starting heartworm patients from adoption, client will need the heartworm treatment authorization form from adoption.
- IMPORTANT:
This form is required for the Medical Center to be reimbursed from the Guardian Angel fund. Not securing the form is the same as not being paid for the service!
- The total cost of adoption heartworm treatment is $100.00 less then our regular cost.
- After putting cost of treatment in to the computer, you will have to bill the cost to adoption and post.
- Go to "PetPoint" the software used for Adoption Center record keeping and look up the pet's vaccination record. Transfer that information to Avimark via the vaccine table.
    - To enter information into the vaccine table, left click in the description field of the medical history then right click.
    - A drop down list will appear and one choice will be "vaccine history".
    - Left click this option and a vaccine table will appear.
    - Choose which vaccine the pet has reeive3d by left clicking on that vaccine choice.
    - A calendar will appear where you can choose the date the vaccination was given.
    - This will need to be done not only for newly adopted animals only but for all new patients.
    - The more complete the history is, the easier it is for us to provide good service.

Vaccination Protocol For Dogs and Cats

Dogs

Distemper Hepatitis Para-influenza Parvo (DHPP)

1. Puppies less than 16 weeks should receive a minimum of three doses of vaccine between the ages of 6 and 16 weeks given 3-4 weeks apart.
2. Puppies and previously unvaccinated dogs over 16 weeks should receive a minimum of 2 doses 3-4 weeks apart

Bordatella

1. Unvaccinated puppies or adult dogs will receive 2 doses, intranasal, injectable or combination of both, given 2-4 weeks apart starting as early as 6-8 weeks of age. Dogs over 12 weeks will receive a minimum of 2 doses given 3-4 weeks apart. A booster is recommended every 6 months for dogs having frequent exposure to dense populations such as boarding kennels and grooming salons.

Leptospirosis

1. Puppies should not be vaccinated prior to 12 weeks of age
2. Puppies 12 weeks or older and previously unvaccinated adult dogs should receive a minimum of two doses 3-4 weeks apart
3. Usually given as a combination vaccination along with Distemper/Parvo (DHPPL)

Lyme (Borrelia burgdorferi)

1. Puppies and previously unvaccinated adults should receive 2 doses given 2-4 weeks apart and can be started as early as 9 weeks.

Rabies

1. Rabies may be legally given as early as 12 weeks and our protocol is to give at 16 weeks along with the final Distemper/Parvo booster or as a separate vaccination anytime after the last Distemper/Parvo vaccination. The state of Florida requires vaccination by the age of 16 weeks.
2. Dogs under one year of age will be eligible for a 1 year Rabies only regardless of the vaccine used.
3. Dogs over 1 year receiving a Rabies booster within the appropriate period of either 1 or 3 years depending on the vaccine used are eligible to receive a 3 year vaccination.
4. Dogs over 1 year that have not been previously vaccinated for rabies or if they have been vaccinated and passed their expiration/booster date will be eligible for a 1 year Rabies only regardless of vaccine used.
5. Remember, if the pet has received any vaccinations from another clinic and the owner brings in that information input that into the medical history via the vaccination table.

Cats

Feline Viral Rhinotracheitis/Calici/Panleukopenia (FVRCP or Upper Respiratory/Distemper)

1. Initial dose may be given at 8-9 weeks of age with a booster at 12-13 weeks.
2. A minimum of 2 initial doses should be given 3-4 weeks apart regardless of age.

Feline Leukemia (FeLV)

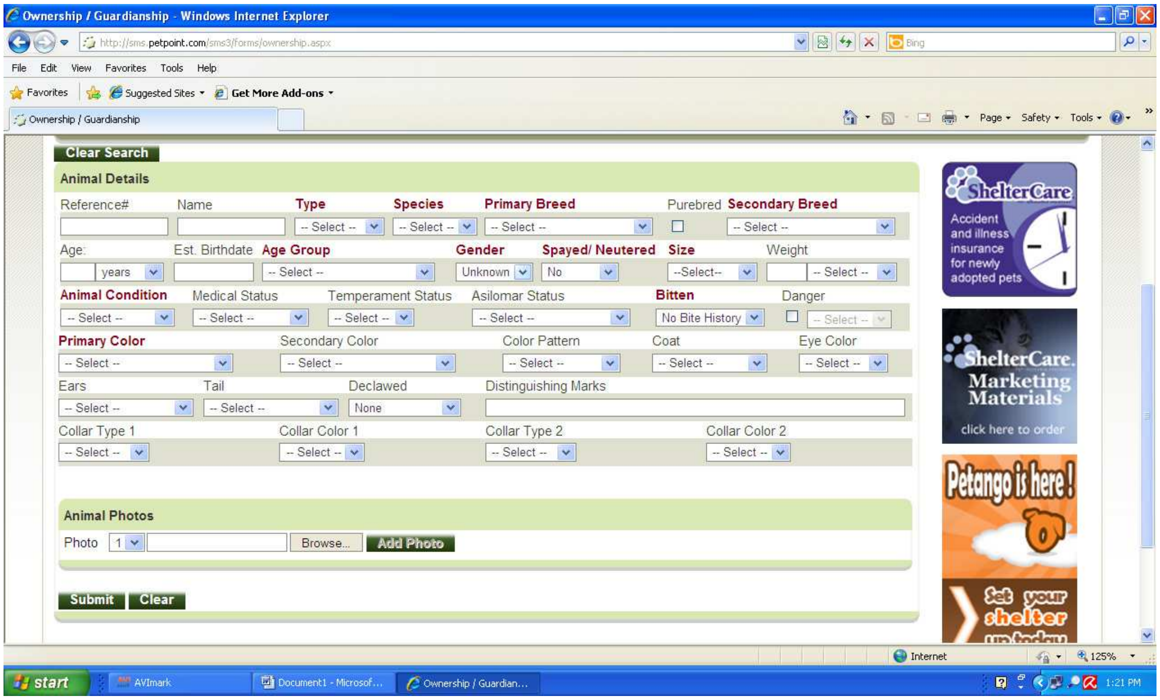
1. A negative FeLV test is highly recommended prior to first vaccination.
2. An initial dose may be given at 9-12 weeks of age followed by a booster 4 weeks later at 13-16 weeks.
3. Regardless of age, two initial doses are required given 4 weeks apart.
4. May be given in on same day as FVRCP vaccination and though it is recommended to either separate the vaccinations or at least not start the FeLV vaccination until the second dose of FVRCP is administered.

Rabies

1. May be given any time after 12 weeks of age.
2. It is suggested to not give the Rabies with both FVRCP and FeLV for the first series.
3. It is acceptable to give FVRCP, FeLV and Rabies on the same day for previously vaccinated adult cats.

HOW TO ENTER MICROCHIPS

- Go to internet explorer
- Pet point will pop up, if not go to www.petpoint.com
- Type in USFL48, username and password
- Find EDIT, scroll down to “OWNERSHIP/GUARDIAN”
- This page that comes up should look like this



- Type in all info about animal that's listed on the microchip paper
- List ANIMAL CONDITION/ MEDICAL STATUS as healthy (unless there is current information stating otherwise)
- Once all available info is entered go to bottom of page and hit "FORWARD BUTTON"
- Next page you click on "Add Person" then enter "OWNER" contact information, click FORWARD BUTTON
- Enter microchip # and "24 pet watch"
- Type alternate contact information at bottom and any other alternate info provided.
- After that is done hit finished.
- If any information is missing, go to AVIMARK and lookup client to get information.
- If there is still information missing call client to get correct info..
- Place microchip paper in "FINISHED MICROCHIPS" folder in phone room.

FRONT DESK PROTOCOL

Opening Front Office

- Get the register and cabinet keys from surgery
- Login to all computers at the front desk
- Make sure the chairs are down and in order every morning
- Unlock product cabinets
- Pull Heartworm treatment folders
- Match with cage card
- Check if payment is due – make note on file
- Turn television on – Animal Planet (only station unless a supervisor gives permission to change
- 7:00 AM
    - Turn on waiting area lights
    - Unlock front doors
- Turn outside sign to "open"

Checking in Clients

When checking in our clients we strive to give the best customer service possible. From the time they step through our door to the time they leave our facility. We need for our client to feel welcome and by doing this there are several steps to follow to give the type of customer service we are striving to give our clients.

Greeting our clients

Step 1: As soon as a client walks through the door with their pet we are to welcome them to our facility with a smile on our face.

- If you are busy with one client, acknowledge the arriving client by making eye contact and say "I will with you momentarily". This alerts the client that you know they are present and will lessen their anxiety about being served.

Step 2: Ask the client if they have an appointment with us.

Step 3: Go to the calendar icon and find the clients name, once you find the name of the client or pet, right click on that name, then choose the "Check-In" icon.

Step 4: If they do not have an appointment create one in the walk-in or walk-in emergency column. Creating the appointment entry is important to management tracking - DO NOT SKIP THIS STEP!

After checking the client in through the calendar you must now check them into Avimark charting area. To do this there are steps that need to be taken.

Checking in our existing clients:

Step 1: Go to the “Client” icon on Avimark, After you click on the client icon then you will go to “Choose”. Click on it and then type in the owner’s last name. Make sure all information in the client area is correct (Name is spelled correctly, address is correct, phone number is correct, and e-mail address).

Step 2: Go to the “Patient” icon on Avimark, Then click on appropriate pet’s name, Next make sure all information is correct in system (Pet’s name is spelled correct, age of pet, breed of pet, color of pet,

Sex of the pet)

Step 3: Next right click on the pet being seen. Click on Document. After the correct pet has been chosen, right-click in the document bar and right click. Find cagecard and double click, then print

Put the chart on a clip board and write in the right corner of the chart the time of the appointment, and if the appointment is an exam or vaccines.

Checking in new clients:

Step 1: Go to the “Client” icon on Avimark, After you click on the client icon then you will go to “New”.

Step 2: Enter the client’s last name, first name, address, phone number, and email address, and then enter.

Step 3: Enter pet’s name, species, breed, age, sex (altered or unaltered), color, any microchip numbers.

Step 4: Go back to the calendar. Click on today’s date and schedule an appointment in the walk-in or walk-in emergency column. Right click and click on the

“New” button Type in the reason for the visit today. Then click the done button.

Step 5: Next right click on the pet being seen. Click on Document. After the correct pet has been chosen, right-click in the document bar and right click. Find cagecard and double click, then print

Put the chart on a clip board and write in the right corner of the chart appointment (appt), time of the appointment, and if the appointment is and exam or vaccines. Be sure to make a note of the Major Presenting complaint, ie the reason for the visit.

McAllister Payment Solutions

Before using McAllister Payment Solutions (MPS) as your point-of-sale and/or integrated credit card process solution, the McAllister Payment Solutions PA-DSS Implementation Guide must be reviewed in its entirety.

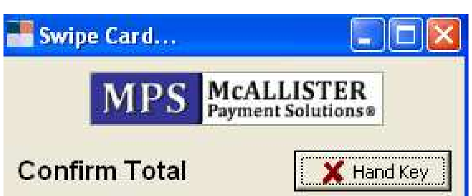
PROCESSING THROUGH MPS and AVIMARK

♦ The first step which must be taken in order to process a credit card through MPS is that the user must be logged into AVImark. Due to security requirements and the need to always record the user who is processing credit cards, MPS will not allow credit card transactions to be processed without being logged into AVImark.

♦ Attempting to process a credit card without being logged into AVImark will generate a message indicating that MPS is unable to be used if no one is currently logged in to AVImark.

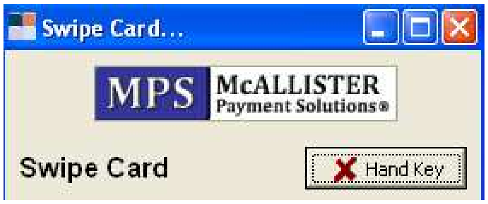
♦ When a credit card transaction has been selected in AVImark and you are utilizing the Magtek card swipe, clicking DONE on the transaction will prompt a MPS window asking for the card to be swiped.

♦ If you are utilizing a Verifone MX850 and are posting a transaction to an existing invoice, clicking DONE on the transaction will prompt the client to confirm the invoice total.



- Confirming the total will then allow the client to select whether they would like to process their card as a Debit or a Credit.

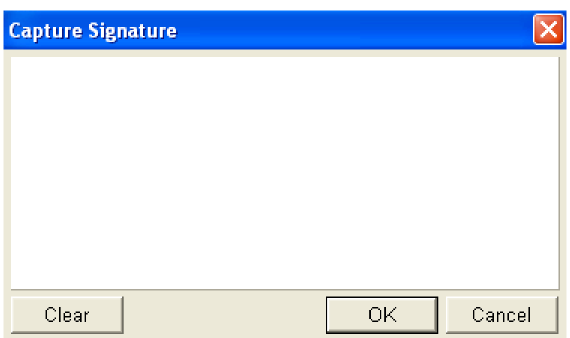
- Selecting the desired payment type will then prompt the client to swipe their card.



- Selecting a payment type of credit and swiping the card will display a signing area on the device allowing the client to sign for the card authorization.
- Saving this signature will complete the processing of the transaction.
- Selecting a payment type of debit and swiping the card will allow the client to enter their PIN to authorize the transaction.

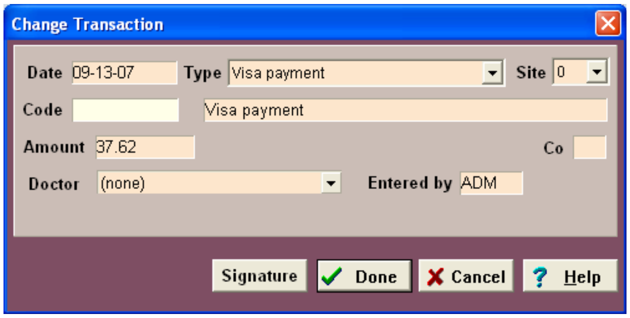
NOTE: It is critical that the card NOT be swiped before the MPS Swipe Card window is displayed.

- If you are using a Topaz Signature capture device to capture digital authorization signatures from your clients, swiping the card using a Magtek card swipe will immediately display a blank window indicating that the processing of the card is waiting for the client's signature.



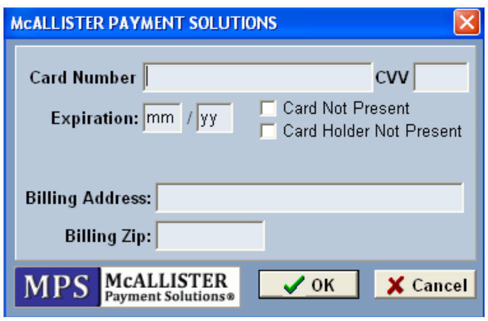
- Once the signature is captured and saved, the processing will complete.

✓ To view a signature accepted for a credit card transaction, double-click on the transaction within the client's accounting and select the Signature button. Selecting this button will display the signature originally saved to this transaction.

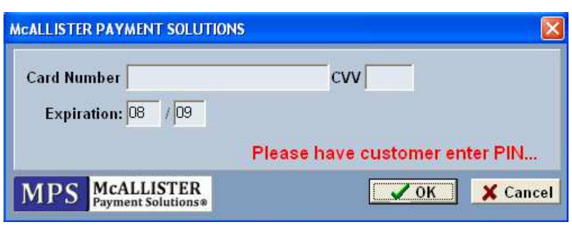


✓ If an invoice with a client's signature is needed for verification of a dispute at a later date, reprinting the original invoice will allow the original, saved signature to print on the invoice.

♦ If a card is not available to be swiped or if the magnet-strip cannot be read, the card number can be hand-keyed using the Hand Key button on the Swipe Card window. Selecting this button will display a field for the card number, expiration date, CVV, and address verification information of the billing address and billing zip. When entering the billing address, only the street number is required.



♦ Selecting and processing a Debit transaction, using a Verifone PIN pad 1000SE, will prompt the MPS Swipe Card window just as credit card transactions. Swiping the card will cause AVImark and the PIN Pad to prompt the user for their PIN to be entered. Entering the PIN will allow the processing to complete.



- Debit transactions will not display a hand-key option since debits transactions require a card and card holder to be present.

♦ If a credit card transaction was processing incorrectly with a wrong amount or to an incorrect client, this transaction can be voided IF it is voided on the same day that it was originally processed. To void an incorrect credit card transaction, select the transaction within the client's accounting and Right-click…Credit Card Void. This function will remove the transaction from your batch as well as remove it from the client's AVImark accounting.

- Since debit transactions automatically debit a specified amount from the client's bank account, these transactions cannot be voided from an open batch. Incorrect Debit transactions will require a new transaction to be created with a negative amount as well as be processed as a Visa or MasterCard rather then a Debit.

♦ If the processing date of an invalid transaction has passed, the transaction will not be able to be voided, but will require a credit to be processed. Processing a credit within AVImark will require the card or the card number to be present, and will allow the AVImark account to also be credited the appropriate amount. For information processing a credit without a card or outside of AVImark, please contact our Technical Support at 1-877-838-9273 ext. 379.

♦ Removing a credit card transaction from a client's AVImark accounting will not automatically remove that transaction from the open batch and/or prevent the client's card from being charged.

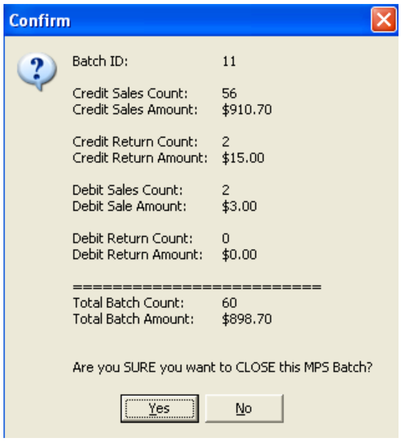
- A prompt is available which can display whenever a processed credit card transaction is being removed from a client's accounting asking if the transaction should also be voided from the open batch. This prompt, "Client's credit card has been charged. Void credit card transaction?" can be set within the Options Maintenance area.

♦ The ability to have MPS detect the type of card that is being swiped or hand-keyed and auto-correct the selected card type in AVImark is available through the MPS option On Account Type mismatch. Setting this option to SHOW MESSAGE will display a prompt anytime a swiped/hand-keyed credit card does not match the card type selected in AVImark. Selecting YES to the displayed message will auto-correct the AVImark card type to match the swiped/hand-keyed card.

♦ If using the AVImark site feature with unique MPS merchant accounts for each site, logging into AVImark under the correct site will allow all transactions processed under that login to be applied to the correct MPS merchant account.

♦ Closing MPS batches can be accomplished either automatically or manually.

- Automatic batching is accomplished at 12-midnight Mountain Time without any user interaction. AVImark will not be required to be running for the automatic batching.
- Manual batching is accomplished by selecting the AVImark Utilities…MPS…MPS Batch. This option will prompt a confirmation window displaying the details of the batch.



- Selecting YES to this batch confirmation will close the batch and provide an opportunity to print a Batch Report.

♦ Viewing processed transactions in real-time is available through our Virtual Terminal. Accessing the AVImark Utilities…MPS…MPS Virtual Terminal will display the customer login screen for the Virtual Terminal. Entering your clinic's Merchant ID and password will provide access to all processed transactions. For more information on the MPS Virtual Terminal, please contact our Technical Support at 1-877-838-9273 ext. 379.

♦ Payment Accounts, stored credit card information stored at our off-site PCI-DSS compliant server, can be created from the AVImark CID and can be used for on-the-fly transactions or recurring payments.

- Before Payment Accounts can be created, this feature will first need to be activated in two areas:

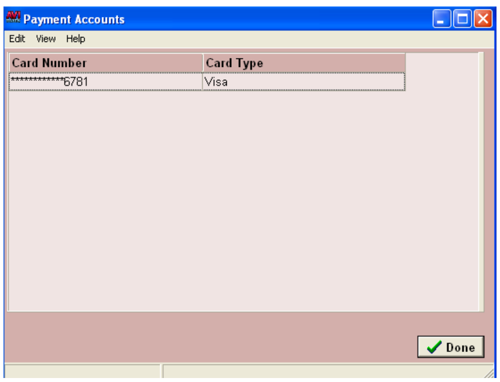
NOTE: This feature in not active by default due to additional monthly fees being associated. For information on the fees associated with storing credit cards through the PASS feature, contact your MPS sales representative.

✓ Within AVImark, select the Advanced Options button , and search for Payment Account. This will display the option Enable Payment Accounts which will need to be set to TRUE.

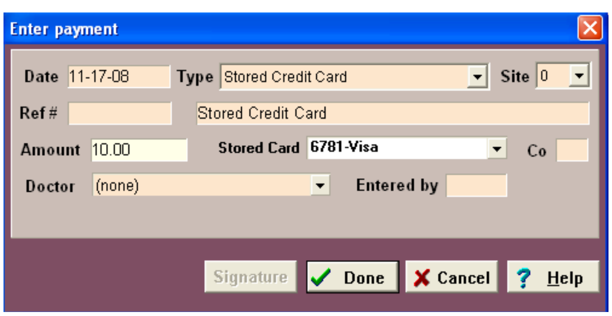
✓ By contacting the McAllister Payment Solutions staff, the clinics merchant ID will be activated to accept Payment Accounts.

- Creating Payment Accounts is accomplished by Right-clicking…Payment Account within the Client area of the CID.
- From within the Payment Accounts window, Right-Click…New will display the MPS Swipe Card window. The credit card you wish to store can be swiped or hand-keyed.

- A very limited amount of information is stored and displayed within AVImark. All other necessary information is stored off-site on our PCI-compliant server.



- An unlimited number of credit cards can be stored for a single client.
- As with processing a normal credit card transaction, the creation of Payment Accounts will be unavailable if no one is currently logged into AVImark. Until a user is logged into AVImark, the Right-click…Payment Account option will be inactive.
- A Payment Account can be used for on-the-fly transactions by entering the desired transaction amount and selecting Stored Card as the transaction type. Within the Stored Card drop-down list, select the appropriate Payment Account to be used and select DONE.



- Recurring Payments, scheduled payments made to an account, can be created to automatically process on a set schedule using a Payment Account created for a client.

✓ Creating Recurring Payments is accomplished by Right-clicking…Recurring Payments within the Client area of the CID.

✓ From within the Recurring Payments window, Right-Click…New will display the New Recurring Payment allowing the user to specify the Amount, Start Date, Number of Payments, Term (Daily, Weekly, Bi Weekly, Monthly, Semi Annual, Yearly), and Payment Account for the client's recurring payment.

✓ All Recurring Payments will be processed when AVImark is first opened on the appropriate date a payment is to be made.

✓ Once all Recurring Payments have been processed, a Successful Recurring Payment Report will be prompted to be printed by the user.

✓ As with processing a normal credit card transaction, the creation of Recurring Payments will be unavailable if no one is currently logged into AVImark. Until a user is logged into AVImark, the Right-click…Recurring payment option will be inactive.

♦ Because the storage and usage of Payments Accounts will have an associated cost for the clinic, optional surcharges are available to assist with regaining some of this cost from the client.

- The Advanced Option Charge Handling Fee for creating new Payment Accounts allows the clinic to charge a set dollar amount each time a Payment Account is created. With each new Payment Account, this handling fee will be added to the client's accounting and will be added to the next invoice created for that client.

✓ To set this handling fee, search for Handling Fee within the Advanced Options.

- The Advanced Option Charge Service Charge on Payment Account Payments allows the clinic to charge a percentage of the payment amount to a client for each transaction that is created using a Payment Account. For each transaction created using a Payment Account, this service charge will be applied to the amount of the payment and will be added to the client's invoice/accounting as a separate line item charge.

✓ To set this service charge, search for Service Charge within the Advanced Options.

- The Advanced Option Charge Handling Fee or Service Charge allows the clinic to choose to charge either a set dollar amount (handling fee) or a percentage of a payment amount (service charge) to a client for each Recurring Payment that is processed for that client. For each Recurring Payment that is processed, one of these surcharges can be added to the client's accounting and added to the next invoice created for that client.

Before using McAllister Payment Solutions (MPS) as your point-of-sale and/or integrated credit card process solution, the McAllister Payment Solutions PA-DSS Implementation Guide must be reviewed in its entirety.

Return on Credit:

If run same day: Open the clients accounting window and right click on the payment and choose credit card void. This will delete the payment in AVImark and stop the payment from processing.

If run a previous day: You will need the client's card or their card number and exp date. Simply go into their accounting window and right click new and enter the payment as a negative amount and swipe or hand key the card.

Return on Debit:

Debits cannot be voided and they cannot be run as a debit type for a negative amount. If a debit needs to be credited, you will need the client's card or their card number and exp date. Go to accounting, do a right click new. For the type, choose the credit card type that displays on the front of the card. Enter the amount as a negative, and swipe or hand key the card.

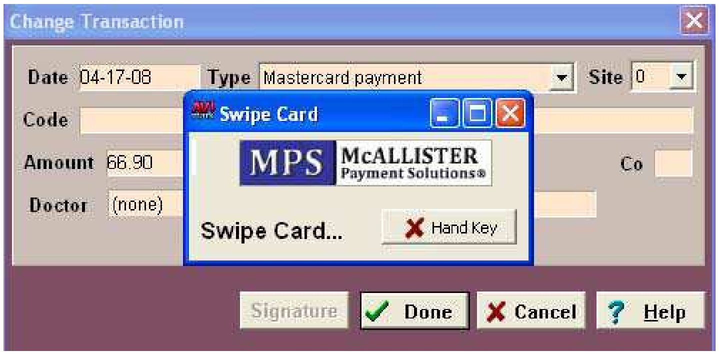
Return an Item:

If the client is returning an item, you will first need to enter that item with a negative quantity into the client's medical history. Then post to accounting using f8 or the speed bar icon with the red up arrow. Ask a supervisor to enter the payment with negative amount for the appropriate card type and swipe or hand key the card. Doing this will keep the client's account zeroed and keep your on-hand quantities accurate.

AVImark Processing Q & A

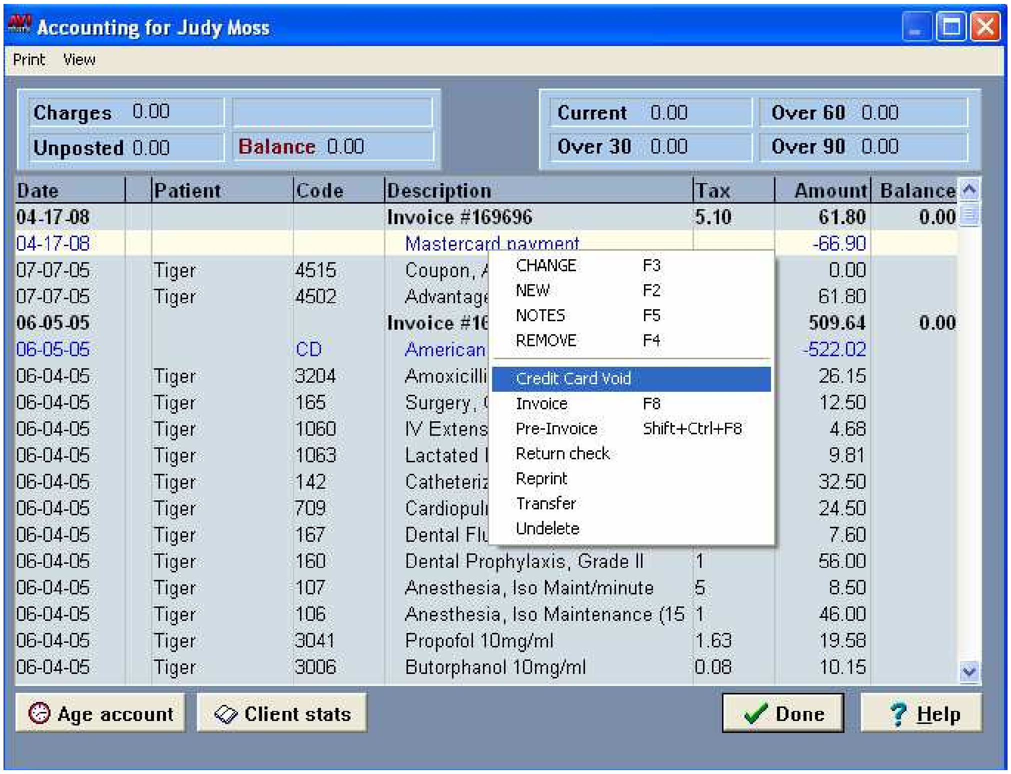
Question 1: When attempting to process a credit card, it is either inserting strange characters into the Referral or Amount fields or changing my payment type after I have selected the corrected types. Why are these characters being displayed or my payment type being changed?

Answer: It is critical to swipe the card only when you are prompted to do so. The card should never be swiped before for the “swipe card” window is displayed. Swiping the card before being prompted by AVImark to do so will result is the above mentioned situations.



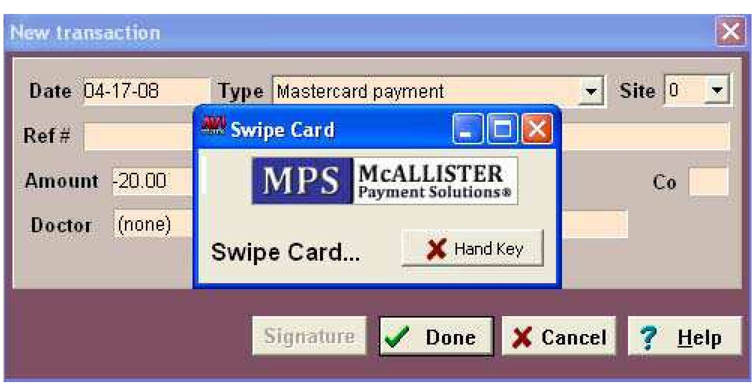
Question 2: Removing a credit card payment from a client’s accounting did not prevent that card from being charged. How do I void a payment that has already been entered into AVImark?

Answer: Because the credit card payment has already been added to the batch of transactions for the day, the credit card payment will need to be voided before it will be removed from the daily batch. To void a payment, highlight the appropriate credit card payment and Right-click…Credit Card Void. This option will not only remove the payment from the daily batch, but will also remove it from the client’s accounting. Be aware that a credit card payment can only be voided on the same day it was originally made. If the payment has already batched out or settled on a previous day, the payment will not be able to be voided, but will need to be credited back to the card itself.



Question 3: How can I credit a client's card for a specific amount?

Answer: When a client's card needs to be credited rather than debited for a specific amount, the credit is performed in a manner very similar to the debit. Select the appropriate payment type within AVImark then specify the amount of the credit as a negative amount. Clicking DONE on the New Transaction window will display the "swipe card" window, and the card can be swiped and processed as normal. The negative amount specified will ensure that the amount will be credited back to the client's card rather then debited from.



Question 4: Am I able to process CareCredit payments through MPS just as all other credit cards?

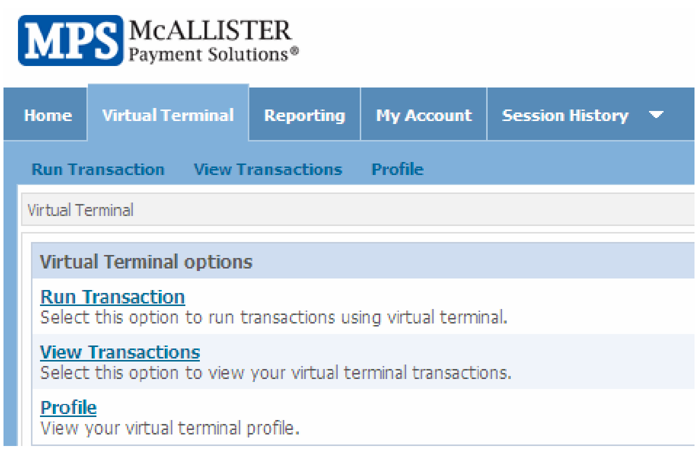
Answer: CareCredit cards are not yet able to be processed through AVImark. The CareCredit payment will need to continue to be selected and the swipe card window closed when displayed since the card cannot be processed. CareCredit cards will need to continue to be processed through the Care Credit terminal.

Question 5: What type of reporting is available through McAllister Payment Solutions?

Answer: Detailed and user-friendly online reporting is available by logging on to www.coremanagementsystem.com. Using the clinic's Merchant ID and user-defined password, mentioned at the beginning of the MPS Instructions, will access the clinic's core reporting information.

Question 6: How can I verify payments have been processed prior to a batch being created?

Answer: Real-time transactions can be viewed by logging on to our Virtual Terminal. This virtual terminal can be accessed by also logging on the website www.coremanagesystem.com. Once inside the Virtual Terminal section, select the View Transactions option. This option will allow you to view transactions from yesterday, today, this week, last seven days, this month, or last 30 days.

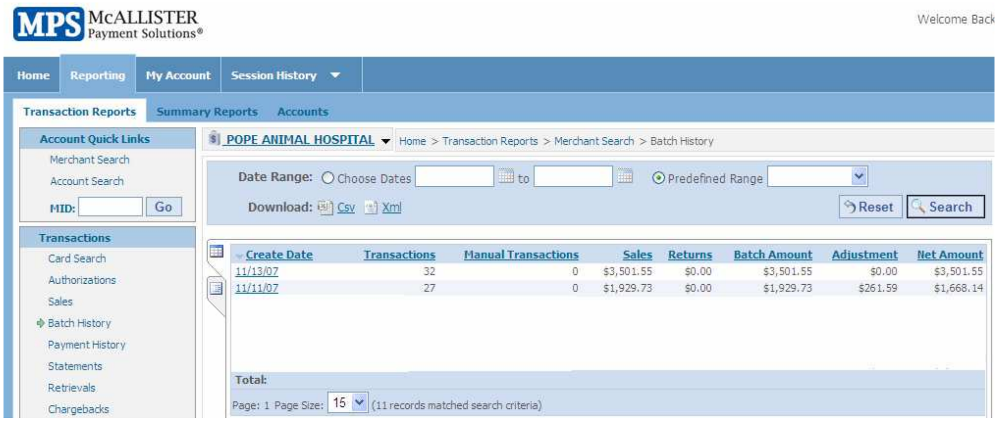


Question 7: Is there a way to process transactions without actually having to enter a payment into AVImark on a client's account?

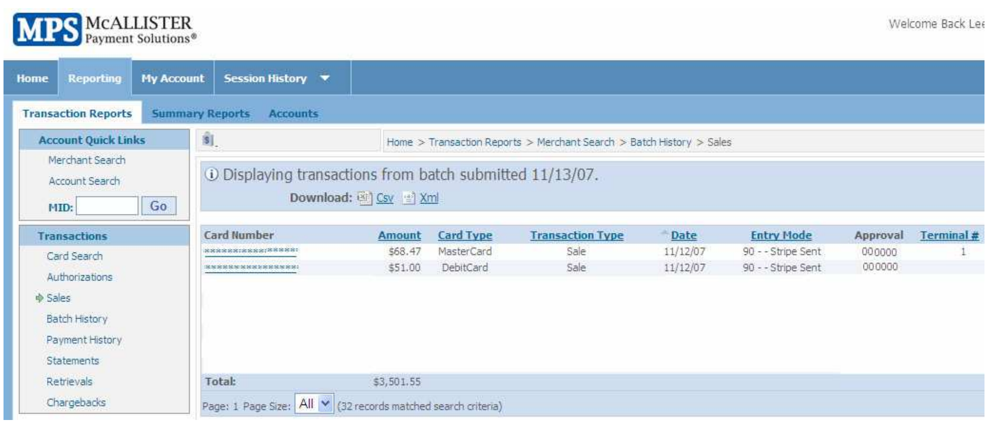
Answer: Yes. Accessing the Virtual Terminal section of the Core Management website mentioned above will allow transactions to be processed through McAllister Payment Solutions without requiring a payment to be added to AVImark. Once in the Virtual Terminal, access the Run Transactions option and select the Sale (Swipe) option. This option will allow you to swipe the credit card using your Magtek card swipe just as you work through AVImark to process the card.

Question 8: Can I print out a copy of all transactions included in one of my nightly batches?

Answer: Within the Reporting section of the Core Management website, select the Batch History option to view all batches for Today, Yesterday, This Month, Last Month, or Year to Date.



Selecting a particular batch will display all transactions for that batch.



Setting the page size to the All at the bottom of the page will display all transactions in that batch and allow this page to be printed using the File menu.

Surgery Check-ins

By doing this you are printing your list for surgeries.

- Click on “work with” in Avimark
- Click on “boarding calendar”
- Click on “work with”
- Click on “whiteboard”
- Click on “arriving tab” left corner of the screen
- Change the dates “from and to” to the day you are going to print for.
- Click on “file”
- Click on “Print Census”
- Check the box for “check in date range”

- Click the date needed in both areas. (This should have the same dates in both boxes)
- Sort by “client name”
- Print

By doing this you are printing the consent for surgical sterilization papers that must be signed by the owner.

- Click on “work with” in Avimark
- Click on “boarding calendar”
- Click on “work with”
- Click on “whiteboard”
- Click on “arriving tab” left corner of the screen
- Change the dates “from and to” to the day you are going to print for.
- Click on “file”
- Click on “Print Census”
- Double click in “document” enter “consent for sterilization” by double clicking again.
- Check the box for “check in date range”
- Click the date needed in both areas. (This should have the same dates in both boxes)
- Sort by “client name”
- Print

By doing this you are printing cage cards and posting the charges on the account.

- Click on “Appointment Calendar”
- Go to the day needed and scroll over to the surgery patients(far right)
- Left click on patient
- Right click scroll down to check in
- Answer YES to ALL questions or OKAY/CONTINUE to get the charges to post on the account.

*By doing this you are printing the consent for anesthesia forms. This is DIFFERENT than the consent for sterilization forms. These forms are used for DENTALS/GENERAL SURGERIES. *

- Go to the account that is having the dental cleaning or special surgery
- Click on the correct patient
- Left click in “description”
- Right click scroll to “document”
- Double click in “document”
- Click on “consent for anesthesia special surgery”
- Click “open”
- Print

By doing this you are printing the vaccination waiver forms.

- Go to the account that is having the dental cleaning or special surgery

- Click on the correct patient
- Left click in "description"
- Right click scroll to "document"
- Double click in "document"
- Click on "vaccination waiver form"(scroll all the way over to the right)
- Click "open"
- Print

*Heartworm patient's do not need a consent form of any kind. Only a cage card is necessary. *

*When stapling all of these forms they need to be in a certain order. This helps the surgery team move quicker with check in's. The consent form "special or sterilization" should be first. Then, the vaccination waiver (if needed) and last is the cage card. *

Opening Front Office

Our goal is to be ready each morning. In doing this there are steps that must be completed every morning.

Steps to open the front office

- Step 1: Get the register and cabinet keys from surgery.
- Step 2: Unlock product cabinet.
- Step 3: Make sure the chairs are down and in order every morning.
- Step 4: Turn on all the computers at the front desk.
- Step 5: Take down the chairs, put a garbage bag in the trash cans, and turn on the lights.
- Step 6: Pull all scheduled heartworm treatments for that day. To do this you would go into the calendar In Avimark, then go into the part of the calendar marked "heartworm treatment". Look to see which pet is scheduled and pull that heartworm file from the filing cabinet. Set those files off to the side until the owner's keep the appointment.
- Step 7: Check surgery schedule for any special surgeries, If there are any specials then print out the estimate from the clients account.
- Step 8: Turn the television on to Animal Planet or the News. These are the only stations that can be on, unless a supervisor gives you permission to put the T.V on another station.
- Step 9: At 7:00 am turn on waiting area lights and unlock the front door, Making sure you turn the sign outside to "Open".

Surgery Check In

Check name from list (highlight)

Pull consent form

Have Client review top information

Sign Consent

Chose any additional treatments patient need

Verify pet current on vaccines

SPCA patient – If they received a rabies vaccine from us, you must print a NEW rabies certificate and stamp with the appropriate vet's signature. Make a copy for the owner and for us to send to Animal Control.

Other Vet – Put vaccine history onto patient's file by filling in the appropriate dates the vaccines were given.

Waiver - if client declines vaccines, waiver is to be signed when checking out.

Check age of patient (ie 5 years or over bloodwork required for $46, 5 months or younger there is a discount price

Special surgery or dental print and load estimate

Record charges on side paperwork (canine left side, feline right side)

Qualified discounts – QT1 or QT2 Tax returns from previous year

Refer to guide in green notebook – adjusted gross income + # in household

Note tier on top and bottom of consent form

Place paperwork on back shelf for Techs

Check Out

Verify weight recorded by tech

Check age of pet (ie 5 months or less:discount, 5 years or older:bloodwork

Correct charges if necessary (it QT!, QT2, age)

Add waiver consent form if necessary

Reprint Rabies certificate

Post – collect payment

Sign waiver if necessary

Give receipt and after care instructions

Rabies certificate – if reprint stamp and give to client at end of day upon release

Rabies being given day of surgery – take to recovery desk so that DR can sign

Notify Prep Techs if any charges were added at check out

Checking in surgery pets

When checking in our surgery clients we need to be proficient and accurate. This is a critical part of surgery check in. Accuracy on the surgery form is a must every morning.

Be sure the clients confirms that the client and pet information at the top of the consent for sterilization/anesthesia is correct and that we have a valid telephone number where the client can be reached during the day.

PHONE ROOM PROTOCOL

Answering Phone Calls

The phone room plays an important role in the first line of communication with our clients. The goal of Reva McClurg Animal Medical Center is to answer every phone call that comes into this facility. When answering the phones we want it to be with the best possible attitude, confidence, accuracy, and with the up most courtesy.

Answer on second or third ring.

SMILE IT WILL BE REFLECTED IN YOUR VOICE

“Thank you for calling McClurg Animal Medical Center, this is (your name), How may I help you?”

Schedule appointment or surgery (*see appropriate protocol for specific instructions)

Provide accurate information but do not offer any diagnosis on the phone

If a client wishes to speak to the Veterinarian

1. Inform client that the Doctor is seeing Patients, in surgery, or out of office

2. Ask the client if you can take a message and have the Doctor return the call

3. Make sure to note Client name, patient name, phone number to call back and reason for their call. Note: It is sometimes helpful to print the patient's chart and write the message on the chart then post it on the doctor's bulletin board.

If a client wishes to receive medication refills

1. Advise client that you will need to speak with the Doctor for approval
2. You will call back after speaking with Doctor
3. If medication refill is approved – take to pharmacy for refill

If you receive a call and you do not know the answer to the question, explain to the client you will need to consult with a technician or Doctor and will return their call as soon as possible. Make sure you have the client name, patient name, and phone number to call back.

If it is necessary to put a call on Hold – ASK the client first. Wait for an answer, thank them , place call on Hold by pushing the "Park" button and note which line the person is on. When returning to call – Thank them again for holding, continue conversation. Remember to not leave the person on hold for very long without at least checking in with them otherwise the caller may hang up.

If the caller is placed on hold because you need to ask someone a question remember to get all the pertinent information the first time such as: caller's name, pet's name, caller's phone number in case the call is dropped, reason for the call, etc.

Return ALL voice mails ASAP!

MAKING APPOINTMENTS FOR SPAY/NEUTER

- Surgery days are Monday – Friday, drop off time is 7:00AMor cats and 7:30AM for dogs & pick up is the same day. We will call the owner when then the pet is ready to be picked up. If we run out of time and can not call the owner the owners must be informed to pick up no later than 4:30 pm for cats and 3:30 pm for dogs.

- All pets must be at least 2 months of age and 2 pounds in order to be spayed or neutered & must be healthy.

- Any animal over 5 years old are required to have pre-surgery blood work done, which is $46.00

- There is an additional charge if the pet is crypt (per testicle charge), pregnant, in heat, or hernia repair (see price list) Crypt is when the testicle or testicles have not dropped down into the sack.

- Make sure to get all client information including animal description.

- When making appointments for dogs, please check that you are putting the right size dog into the right line. Up to 35 lbs is considered a small dog, 36-50 lbs considered a medium dog, and over 50 lbs is a large dog.

PRE-SURGERY INFORMATION

Drop off time is 7:00 or 7:30AM and allow approximately 30 minutes for filling out paperwork and checking in your pet.

- Cats must be in a clean carrier lined with a clean towel – only one cat per carrier. Dogs must be on a leash & have a bath the day before surgery.

- No food after 11pm the night before – they can have water

- Rabbits need food 24/7 and the owner must bring in food for them for the day.

- Feral cats must be in a live trap – only one cat per trap (no appointment necessary for feral spay/neuter)

- There is an additional charge if the pet is crypt or pregnant. (See price list)

- If you qualify for a lower price you must bring your last year's 1040 tax return that is signed.

- Payment is due the morning of your appointment. We accept cash, checks, Visa, MasterCard, American Express, Discover, Care Credit

- Pick up is the same day. We will either call when they are ready to be picked up or for cats between 3:30pm – 4:30pm, or dogs between 4:00pm-4:30pm.

Non Spay/Neuter Surgery Appointments

- Drop off time is the same as for spays and neuters
- Do not schedule more than three each of declaws, dentals, special surgeries
- If a pet has not been examined for the procedure being scheduled then an exam can be scheduled with a doctor at 8AM at which time the doctor will determine if the procedure is appropriate and prepare an estimate.
    - Make it clear to the client that you cannot give an accurate quote on the phone and the doctor will do that during the scheduled visit.

Daily Client Call Back Procedure

- Each day a report is to be printed containing the surgeries released and patients seen for an exam the previous day.

- Each of these Owners should be called to see how the patient is doing.

- Each calls' follow up is to be noted in the patient record using the code Telcon" with a note attached summarizing the conversation. If there is no answer and a message is left then note the same using the abbreviation "LVM"

- If the patient is reported as doing anything less than good or if the client has any questions the same is noted in the file and a message passed on to a Doctor to call the client back.

- The doctor, the message was passed on to should also be noted in the patient file.

- A note of disposition is also to be marked on the printed list of call backs and that list passed on each day as soon as it is completed to the Medical Director for review.

Daily Client Call Back Procedure

HOW TO DO A FOLLOW UP CALL

First thing in the morning to print the list

Go to "Work With"

Then "Follow up-list"

Click the tiny plus sign next to "Non critical list"

Go to "File"

Go to "Report"

"Print"

Go through each account.

Check to see for sure what day the pet was here. (you can do this by clicking on "accounting" at the top right hand corner of the screen)

Check to make sure the pet is not deceased.

Make sure the pet is not hospitalized. (Note: all declaws stay overnight)

Call each account if all of the above is met. Make a note on the paper of what the client says.

TO POST THE FOLLOW UP CALL

Go to “work with”

Then “follow up list”

Locate the name of the pet you’re entering the note for-Right click on the name choose “notes” click “done” after entering the note.

Right click again on the same patient choose “post”

Continue process until entire list is complete.

PHONE ROOM MEMOS

!!IMPORTANT!!

- BRING CALL BACKS TO YOUR MANAGER DAILY!
- ESTIMATES ARE ONLY GOOD FOR 30 DAYS!
- ALL ANIMALS OVER 5 YRS REQUIRE PREOP BLOODWORK
- HEAT CYCLE IN DOGS LAST APPROX 30 DAYS—MUST WAIT AT LEAST 30 DAYS AFTER THAT TO SCHEDULE SPAY
- ENCOURAGE A FECAL "Add On" TEST ($11) WITH EACH VACCINE APPT
- PLEASE DO NOT SCHEDULE TREATMENTS OR SURGERIES FOR SATURDAYS
- RABBITS COMING IN FOR SURGERY MUST HAVE FOOD 24/7 OWNER TO BRING FOOD
- SURGERIES FOR THE NEXT DAY NEED TO BE ADDED TO CUBEX IF THEY ARE A NEW PATIENT
    (REQ’D INFO: PATIENT ID, PATIENT NAME, OWNER NAME-FIRST AND LAST, SAVE)

Phone Room

ENCOURAGE any pet receiving a puppy pack, dog pack, kitten pack or cat pack to receive a fecal test (test for intestinal parasites). Owners can bring in a sample (“thumbnail size’) at their scheduled appointment time (a sample will help that we don’t have to get “personal” with the pet and save owner a second trip to return sample) *Note if sample collected more than 1 hour prior to appointment time they can refrigerate sample.

Call Backs – the call back for exams are to be done 2 days after their appointment time and surgeries and heartworm patients 1 day after procedure. If pet is reported to be doing well-note on call back sheet and computer. IF owners has concerns or pet is not doing well – suggest we schedule an appointment ASAP to check the pet (preferably same day). If not possible take message and report to attending Doctor. If Doctor is not in that day have another Doctor call client to discuss issues.

Making appointments for exam and vaccines

Our Goal is customer satisfaction when making an appointment for our clients, whether it is an appointment for an exam or an appointment for vaccines. We strive to be as flexible with the appointment as possible.

There are a few key points to know before you schedule an appointment.

1. Our appointment days are Monday- Thursday 9 am to 7 pm. The last appointment Monday-Thursday is at 6 pm for exams and 6:30pm for vaccines.
2. Friday hours are from 9 am to 5 pm. The last appointment time is 4:00 pm for exams and 4:30 pm for vaccines.
3. Saturday hours are 9 am to 4 pm. The last appointment time is 3:00 pm for exams and 3:30 pm for vaccines.
4. We are attempting to phase out walk-in appointments. Please try to schedule all appointments. Appointments can be made between 8 am to 9 am Monday – Saturday if needed.
5. When making an appointment in the calendar always use the Refresh button (F11) to make certain that the computer updates all new appointments scheduled. If you do not refresh the screen then there will be a possibility of over booking in that time frame.

Scheduling an appointment for an existing client

Step 1: Ask if the client has been here before.

Step 2: If the client has been here before go into the calendar, choose a date and time that

the client requested. (If the time is not open, suggest another time that is open).

Step 3: Click on the date and time the appointment is to be scheduled, Right click and hit

the “Choose” button. Type in their last name or type in their account number.

Step 4: Choose the correct animal that is in need of an appointment. Then choose the

“Done” button

Scheduling an appointment for a new client (client is not in our system)

Step1: Ask the client if he/she has been seen in the clinic. If the client says “No”, Go into Avimark, pull up the client’s name to make sure they are not in our system. If the client is not in our system, then admit them into Avimark the way you would if you were “Checking in a client”. (See checking in new clients in manual)

Step 2: Once the client is admitted into Avimark then go back to the calendar. Click on date and time the appointment is to be scheduled, Right click and click on the “Choose” button Type in the client’s last name or type in their account number.

Step 3: Choose the correct animal that is in need of an appointment. Then choose the done button.

Step 4: Get an appointment card and write the client’s appointment date and time, Give the reminder card to the client.

MAKING APPOINTMENTS FOR SPAY/NEUTER

- Surgery days are Monday – Friday, drop off time is 7am & pick up the same day. We will call the owner when then the pet is ready to be picked up. If we run out of time and can not call the owner the owners must be informed to pick up no later than 4:30 pm for cats and 3:30 pm for dogs.

- All pets must be at least 2 months of age and 2 pounds in order to be spayed or neutered & must be healthy.

- Any animal over 5 years old are required to have pre-surgery blood work done, which is $46.00

- There is an additional charge if the pet is crypt (per testicle charge), pregnant, in heat, or hernia repair (see price list) Crypt is when the testicle or testicles have not dropped down into the sack.

- Make sure to get all client information including animal description.

- When making appointments for dogs, please check that you are putting the right size dog into the right line. Up to 35 lbs is considered a small dog, 36-50 lbs considered a medium dog, and over 50 lbs is a large dog.

Pre-Surgery Information

- Drop off time is 7:00am for cats and 7:30AM for dogs. The client should allow approximately 30 minutes for filling out paperwork and checking in their pet.
- Cats must be in a clean carrier lined with a clean towel – only one cat per carrier.   Dogs must be on a leash & have a bath the day before surgery.
- No food after 11pm the night before – they can have water
- Rabbits need food 24/7 and the owner must bring in food for them for the day.
- Feral cats must be in a live trap – only one cat per trap (no appointment necessary for feral spay/neuter)
- There is an additional charge if the pet is crypt or pregnant. (See price list)
- If you qualify for a lower price you must bring your last year's 1040 tax return that is signed.
- Payment is due the morning of your appointment. We accept cash, checks, Visa, MasterCard, American Express, Discover, Care Credit
- Pick up is the same day. We will either call when they are ready to be picked up or for cats between 3:30pm – 4:30pm, or dogs between 4:00pm-4:30pm.

NOTE

The person scheduled in the phone room until 7:30pm will be responsible for:

- Answering phones
- Completing daily call backs for surgeries, exams, and fecal follow ups
- Preparing surgery print outs for the next morning along with HW patients that are coming in
- Inputting microchip information
- Inputting the walk-ins from the daily cage cards
- Filing away the signed estimates and surgery papers for the day

- Putting the advantage or frontline receipts onto the client invoices
- Entering all NEW surgery patients information into Quebex.

Anyone scheduled in the phone room day/night will be responsible for answering the phones in a professional matter and by stating “This is the McClurg Medical Center my name is …. How can I help you?”

Secret callers will randomly call and be making note of how the phone is answered and what you are recommending. Please note that with every routine vaccination appointment a fecal should be recommended. Having the client bring in the sample would be ideal.

MOBILE VACCINATION CLINIC PROTOCOL:

- Preparing For Your Day:
  - Find cash box from Radiology cabinets/storage bins designated for the Mobile Unit.
  - Get $100 cash from Drawer 1 (there will be enough money in cash drawer 1 leftover from Friday night).
  - Make sure there are business cards in the cash box.
  - Take the portable credit card machine with power chord along with you.
  - Double check that the check-out storage bin has the following:
    - Calculator
    - Donation Box
    - Sign explaining forms of payment allowed
    - Advantage Parasites flip book
    - McClurg Animal Medical Center pamphlets
    - Stapler
    - Plastic Bags for product purchases
    - Two boxes of each product for each size. Ex: (2 boxes of Heartgard size <25lbs., 2 boxes of Heartgard size 26-50lbs., 2 boxes of Heartgard size 51-100lbs.)
    - Accordion File to store carbon copies of all paperwork.
    - Folder containing manual credit card slips
  - Once you are positive that you have all the necessary materials, help fellow teammates pack up the van.

- On The Road:
  - Set-Up Of Check Out Table:
    - Display payment sign, pamphlets, flip book, donation box
    - You will need your stapler, cash box, portable credit card machine, accordion file
    - Keep your product bin underneath the table.

            - For every box you sell, you must replace it with a new box from the back up supply kept in the van before arriving at the next location.
            - For all over-the-counter products (Frontline and Advantage) we must add Florida State Sales Tax to their purchase.
            - Due to inventory purposes, we are only able to sell products in increments of 6 months or 12 months (1 box or 2 boxes).

    - Checking Out Clients:
        - Once the pet(s) has received vaccines/tests, make sure all of the necessary information on the paperwork has been filled out in its entirety. Such as:
            - Vet signatures
            - Owner signatures
            - Dates
            - Test results
            - Owner information (address, phone number)
            - Pet information (name, breed, age, sex [altered or unaltered], color)
            - If purchasing products (flea and heartworm prevention) record pet's weight, and if splitting a box between two pets make note of that in the appropriate pet column in the notes section.
            - If pet is receiving a microchip, the owner must fill out the entire microchip sheet
            - *Payment information*: In order to document the appropriate payment received in Avimark, we must have the following: Type of payment, price of services for each pet, total cost of services, and products purchased.
            - *Clearly initial the payment area*
        - Staple the half sheet of clinic information such as our clinic, animal control, and emergency services to the yellow copy of proof of vaccines along with yellow and pink copies of the rabies certificate if it applies and the customer copy of credit card receipt if it applies. Explain to the client the necessary steps to register their pet's rabies with the county
        - Keep the white copies of the proof of vaccines and the white copies of the rabies certificates in the small accordion file. Make sure you keep them in numerical order and that all of the numbers are accounted for.
        - Keep the merchant copy of the credit card receipts in a safe place until you return to the clinic (such as the bottom of the cash box)
- Returning To The Clinic:
    - Help your teammates unload the mobile unit
    - Settle the credit card machine by following the directions on the machine.
    - Turn power off credit card machine and plug into wall so it will charge the battery for the following week.
    - Count all of your cash
    - Create a short deposit slip including:
        - Cash, credit, deposit and actual, and totals
    - Put deposit slip, credit card receipts, credit card settlement receipt, and cash in a deposit envelope and deposit into the safe like you would at the close of the clinic.

- Bring the white copies of the proof of vaccination and rabies certificates to the phone room for input on Monday.