

How to leverage VisionVPM in current times

This document contains some tips to utilising VisionVPM during the Coronavirus (COVID-19) situation.

Keep Your Clients Informed

Whether you are changing the services or products offered to your clients or closing the practice for a period, it is important to keep your clients in the loop. Use the **Marketing Schedule** to generate lists of your clients and merge directly to email or text.

For more information, view our guide to **Mass Communications using email in VisionVPM**

Access to Information

Utilise the Homepage

In the Clients Menu you will find the **Homepage**. Here you can customise 'Clinic Announcements' which will be visible on all computers. Additionally, you can add links to information pages that are relevant for you and your staff for easy access.

Recommend enabling 'Show the Homepage automatically when all windows are closed' under the Setup button on each workstation.

Client Communications

Diary

Use the diary to leave notes for other staff members, or even yourself. The diary which can be a great tool if you are no longer in the same physical location to ensure that tasks like follow-up phone calls are still being done.

You can also **email or SMS** the staff member the task is for so they have the information required if they cannot access VisionVPM.

SMS

VisionVPM **two-way text function** means that you can communicate with your clients easily, quickly and have the transcript recorded in the Client's Communication window. Consider phone calls that can be replaced with a text message if your staff numbers get depleted and setup templates to make these easier and quicker to send out.

Automated Communications

Consider what you are currently automating like your pet reminders and appointments reminders. If you have made changes to services you are offering, even for a period of time, do you still want these going out?

Individual Automated Reminder Plans can be inactivated and then reactivated when appropriate. You will need to manually 'fill the gap' for Reminders not sent while it was inactivated but this can be done from the Reminder Schedule

If you decide to continue to send these communications out, consider whether you need to change your email or SMS templates to reflect any changes in your services for example, let your clients know there will be changes to the waiting room or any other processes before they arrive as part of your Appointment Reminder template.

Post Appointment Messages

Automate check-in calls post appointment/procedure using Post Appointment messages. This will ensure these services are still being offered if you have staff restrictions. Monitor incoming SMS replies for anything that requires further action.

Email Consent Forms

Minimise face-to-face time during admission by emailing consent forms to clients prior to their arrival. This can be done from the appointment > right-mouse click appointment > Send Email to.

By default, details of the appointment date, time and type will preload but use the Add Attachment button to send any forms or information sheets.

Changes to the Workflow

Remote Consults

If you choose to offer remote consults – whether these be via services like Facebook Messenger, Skype, Facetime, you should differentiate these from any in-clinic services.

Add some new **Appointment Types** in your Appointment book to identify these consults to the staff and consider how long you would need which may be longer than for a face-to-face consult of the same nature. This may require some tweaking as this is a new experience for some staff.

In addition, you might like to create a **clinical template** with a specific clinical description with a script or what to ask/check and link to this Appointment Type.

Email Photos

For clients that are unable to come into the practice, consider asking clients to email photos of anything relevant that you can then permanently attach to the Clinical Record using the Photos button.

Schedule Pick-ups

Edit your reminders for Preventative Medications or Repeat Scripts to offer a pickup service. Clients could call in, have their items invoiced and paid for while on the phone and simply come in at an agreed upon time to collect.

Setup a new Appointment Type for “Medicine Pickup” which will give pet-owners an allocation for a time. This way, staff will have time to prepare while still limiting the number of clients in the clinic at any given time.

Consider Home Delivery

Have you considered home delivery? Expanding on the above, you may like to offer a “Contactless Delivery” service where you send a staff member out to deliver these items within an acceptable radius to the practice.

Create a new Appointment Type for “Delivery” and book into the calendar. Set a SMS for this Appointment Type to let you clients know that their delivery will be coming.

Make these appointments for delivery in an existing or new resource, processing the invoice and payment against the appointment for visibility. Use the Label feature to keep tabs on who get what and place in a designated area in the clinic.

Using the Maps feature under the Appointment Search, set out your run to make sure you don't double back on yourself when you hit the road.

Predict Product Sales

To proactively manage certain product sales that do not have reminders, such as prescription food, utilise the Previous Sales to anticipate who will require certain products. The date of the sale to search for will be in respect to the size and dosage of the product.

i.e. If the bag of food should last 28 days if the recommended daily amounts are given, then we would be looking for sales approx. 28 days ago.

From the Marketing Schedule, insert a new search and enable the Invoice Tab by ticking 'search invoice details'

- Client Tab – Leave the default
- Animal Tab – Leave the default and enter N in the **Inactive** field to search for Active and Alive animals
- Invoice Tab – search for sales in a specified **date range** for either the **Stock Code** for an individual item or appropriate **Sales Group / Analysis Group** for a collection of products. Note: Analysis Groups can be created and items added to facilitate these searches.

From the resulting list, you can either:

- Merge to mail, email or SMS to send out a communication
- Navigate to the Client or Animal using the respective buttons in the ribbon

Change Appointment Times

Avoid longer waiting times in the waiting room by extending your consult times in the Appointment book > Appointment Types. Even if you don't feel it's necessary to add extra time, consider using it as a 'buffer' between appointments

If you offer online booking, don't forget to make the same changes there.

Remote Access Options

Can you connect to your VisionVPM database if you are not in the building? If not, discuss your remote access options with your IT Service Provider or see our **Remote Access Options with VisionVPM** guide.

Contacting the VisionVPM Service Desk

If you require help throughout the steps described in this document, please contact the VisionVPM Service Desk.

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