



Standard Operating Procedures



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Name of Policy:	How to Enter Communications/Callbacks	Departments:	CSR
Category & No.:	CLI 5.1	Effective By:	7/24/2025
Version No.:	1.0	Revision History:	Original

Purpose: To outline how to properly enter communications and callbacks into EzyVet.

Procedure:

How to enter Communications/Callbacks (PC, ER/Spec, Pharmacy, Client Concern):

CSR Team:

1. Current client calls with a question/issue
2. CSR triages the call to determine if the call is an emergency vs something they can handle such as scheduling vs need to leave a message for department to return call
3. If taking a message is appropriate, CSR explains to clients that you will transfer them to the department's voicemail. The department will receive the voicemail and a transcription via email.
4. If the CSR needs to take the message for the department (like client is adamant about CSR taking the message), the message should be taken. **Please see below for department specific "How To" on completing the callback**
5. Department team members are responsible for checking communications dashboard for messages that were not received via voicemail.

Doctors and Techs:

1. Voicemail messages will be delivered to the department's email address.
2. Department team members must also check the communication dashboard for messages that were taken by other staff members. These will only be taken if the client refuses to leave a voicemail message.
3. Department team members are responsible for reaching out to the hospital administrator if changes to the standard voicemail message are required.

Voicemail Extensions (Transfer calls to these numbers):

1. Behavior 103
2. Exotics 175
3. IM 191
4. Neurology 228
5. Oncology 194
6. Ophthalmology 138
7. Rehab 274
8. Specialty Surgery 183

- 9. Financial 213
- 10. Client Concerns 266

How To:

If the communication is in reference to a specific visit, navigate to the patient's **CLINICAL RECORD** otherwise, please navigate to the **PATIENT CHART** to record the callback. Please remember that a call back can take up to 72 hours for turnaround time.

For a PC doctor:

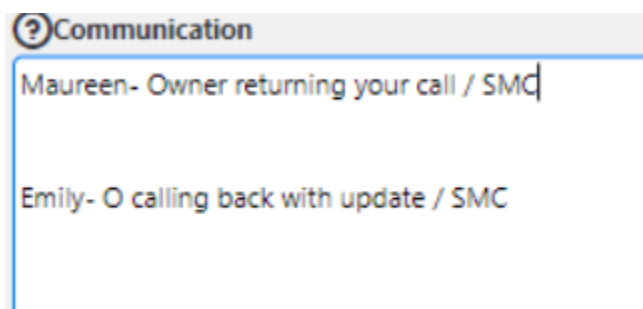
What communications go directly to the PC doctors:

- Follow up messages or updates from recent visits
 - Lab Results
 - New Medication Requests
 - Refill requests go directly to pharmacy!
 - Primary care per diem doctor messages can be sent to the PC department head, Dr Erika Sweigard
1. Click on call back.
 2. In the "Reason/Communicates" section, pick "Doctor Communication" as this is FOR the doctor.
 3. Choose the correct phone number and under that toggle the dot to "incoming" (if it is an incoming call).
 4. Choose the appropriate template to use.
 5. Under "Department", choose MLAH Primary Care.
 6. Under "Assigned Staff Member", choose the PC doctor that the message is going to.

For PCA's (ER/PC):

What communications go directly to the PCA's:

- ER client questions, unrelated to diagnostic results
 - Follow up questions from recent discharge
 - PC calls that cannot wait for their doctor to return or calls that need a same day call back
1. In the "Reason/Communicates" section, pick "ML PCA ER" or "ML PCA PC".
 2. Choose the correct phone number and under that toggle the dot to "incoming" (if it is an incoming call).
 3. Select the appropriate template to use.
 4. Under "Department" please choose MLAH Primary Care (FOR THE PC-PCA) or MLAH EMERGENCY and CRITICAL CARE (FOR THE ER-PCA) (if the callback is specifically for one of the PCA's from an owner returning their call, in the message put their "name-" and then the message. See example below.



1. Put in Mount Laurel Animal Hospital (MLAH Emergency and Critical Care) as the "Assigned Staff Member" OR Mount Laurel Animal hospital (MLAH Primary Care).

For ER Doctors

What communications go directly to the ER doctors:

- Diagnostic results (bloodwork, imaging, cytology, biopsy, etc)
 - Communication for exotic pets seen on the emergency service should be sent directly to the exotics department
 - Emergency per diem doctor messages can be sent to the ER department heads: Dr Grant Crandall, Dr Patrick Kelly
1. Click on "Callback"
 2. In the "Reason/Communicates" section, pick "Doctor Communication" as this is FOR the doctor.
 3. Choose the correct phone number and under that toggle the dot to "incoming" (if it is an incoming call).
 4. Choose the appropriate template to use.
 5. Under "Department" please choose MLAH Emergency and Critical Care.
 6. Put the Assigned Staff Member" as Mount Laurel Animal (the dept).
 7. Mark the communication as "Done" (they do not use the communications- we send an email so it does not need to stay as pending)
 8. Copy the whole message and email the ER doctor the communication, (don't forget to CC PCA@). Be sure to include the owners and pets information and sign the email with your name.

Pharmacy Refill Requests

1. In the "Reason/Communicates" section, pick "Pharmacy Communication".
2. Choose the correct phone number and under that toggle the dot to "Incoming" (if it is an incoming call).
3. Choose the appropriate template to use (Refill Request - MLAH Phone).
4. Under "Department" please choose MLAH Pharmacy (Mount Laurel Animal Hospital).
5. Put the Assigned Staff Member" as Mount Laurel Animal (MLAH Pharmacy)

For all other specialty departments:

What communications go directly to the Specialty doctors:

- Diagnostic results (bloodwork, imaging, cytology, biopsy, etc)
 - Follow ups / updates from recent visits
 - Requests for new medications
 - Refill requests go directly to pharmacy!
1. Click on "Callback".
 2. In the "Reason/Communicates" section, pick "Doctor Communication" as this is FOR the doctor.
 3. Choose the correct phone number and under that toggle the dot to "Incoming" (if it is an incoming call).
 4. Choose the appropriate template to use.
 5. Under "Department" please choose the correct department ie: MLAH Oncology, MLAH Internal Medicine etc.
 6. Put the Assigned Staff Member" as Mount Laurel Animal (the dept)

Client Concerns:

1. Click on call back.
2. In the "Reason/Communicates" section, pick "Client Concerns MLAH".
3. Choose the correct phone number and under that toggle the dot to "Incoming" (if it is an incoming call).
4. Choose the correct template to use.
5. Under "Department" please choose "Mount Laurel Animal Hospital".
6. Under "Assigned Staff Member" Choose Jackie's name. See Below

New Phone Communication for Test, Mrs. Test (ML_8166450)

Date: 07-07-2025 Time: 11:35PM Status: ☒ Pending ☐ Done

Reason/Communicates: +

Department: Assigned Staff Member:

Phone Call Log

Phone Number: ← (856) 234-7626(Mrs. Test Test[Home Phone])

☐ Incoming ☒ Outgoing

Template:

Communication

Message taken by: Sierra M.
07-07-2025
Test, Mrs. Test

Description of concern: #INPUT#

Please inform owner to look out for an email and confirm their email!

#INPUT#[Client requests to be contacted: /Yes/No]

General communications/conversations to be documented:

1. Click on call back.
2. In the "Reason/Communicates" section, pick "CSR communication".
3. Choose the correct phone number and under that toggle the dot to "Incoming" (if it is an incoming call).
4. Choose the appropriate template to use.
5. Under "Department" please choose Mount Laurel Animal Hospital.
6. You can leave the "Assigned Staff Member" as yourself.
7. Mark the callback as "Done".

To check and perform callbacks:

1. Navigate to the Dashboard, then to the Communication Tab.
2. On the communication tab, filter under the FOR/FROM to find communications for you.
3. Double click anywhere on the callback to open it. Document the call at the bottom of the communication box.
4. Click on the "Done" button, or leave it as pending if you are sending the message to another employee
5. Select "update". This will add the update to the message on the record and remove it from the list.

****THE MEMO BUTTON SHOULD ONLY BE USED FOR INTERNAL COMMUNICATION****