Practice Dashboard

User Guide

COVETRUS® COMMS

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Introduction

The Practice Dashboard focuses on all of the daily use functions of Covetrus Comms. It features a modernized user interface (UI), a homepage that displays Key Performance Indicators (KPIs), an easy to navigate Clients section, a two-way MMS Messages Center, enhanced reporting, and more.

More upgrades are on the way! Comms functions that have not yet been upgraded can still be found in the Legacy dashboard, which is always accessible from the bottom left of the UI. This guide reviews the available features and instructions on where to find important functions and how to complete daily workflows.

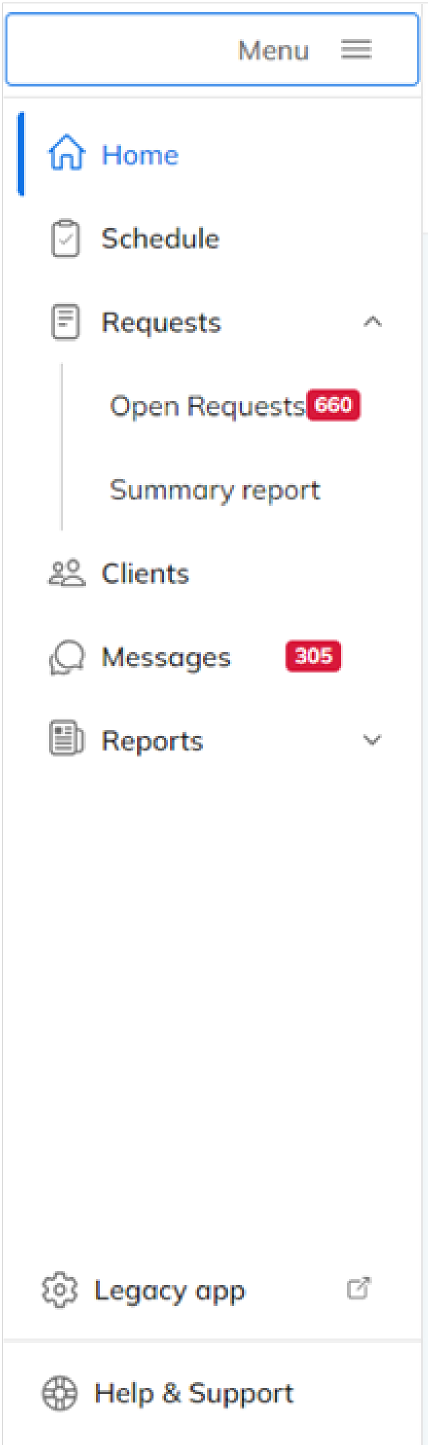
Home

Status

Hover over the ⓘ to view the exact date and time that Covetrus Comms last fully synchronized with the Practice Information Management Software (PIMS).

- Connected: Last sync within the past 24 hours.
- Connected: Last sync within 24-72 hours (data is 1-3 days old)
- Disconnected: Last sync more than 72 hours (3 days) ago. Automated messages are suspended when connection status is red, to prevent out-of-date messages from being sent to clients.

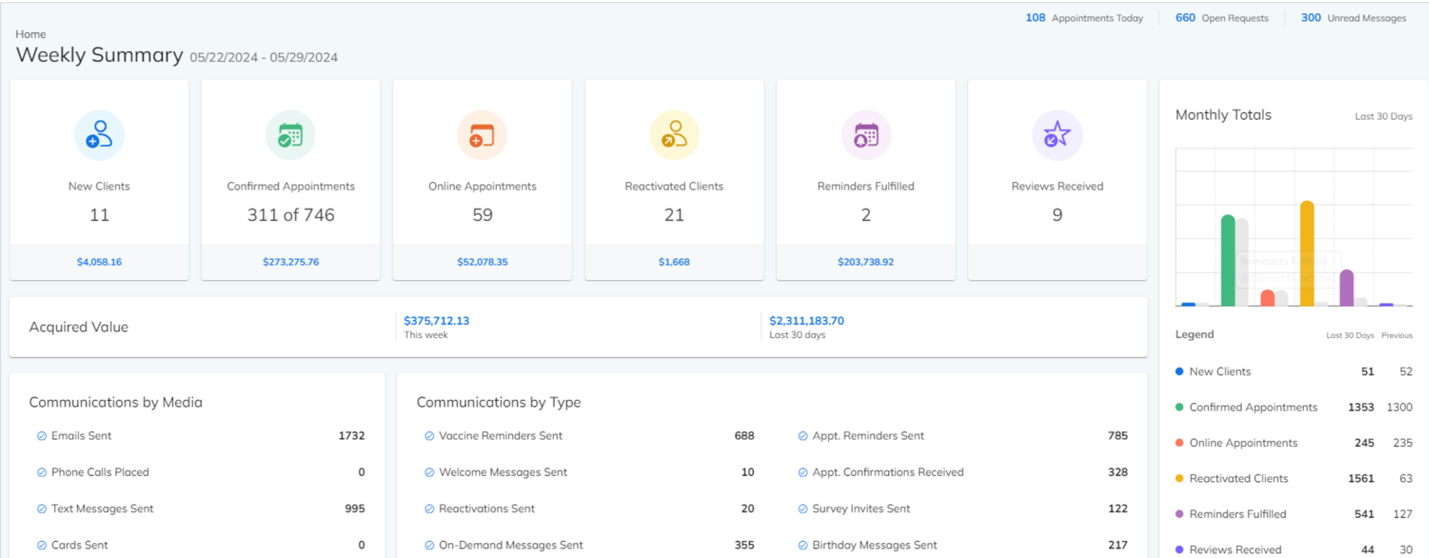
Menu



Use the Menu to navigate through Covetrus Comms. Menu options are as follows:

- **Home:** Return to the main landing page which shows Weekly Summary and other Key Performance Indicators
- **Schedule:** View booked appointments for past, current, or future dates.
- **Requests:** Manage requests submitted by clients from Pet Portal, including client or patient profile updates, certificate requests, and more. The badge indicates unread requests.
- **Clients:** Search clients to access patient information, update contact preferences, manage Pet Portal access, review communication history, access past and future appointments, or start a virtual (telemedicine) visit.
- **Messages:** Access all active SMS message threads with full message history. The badge indicates new unread messages.
- **Reports:** Access over a dozen sortable, searchable, filterable, and printable reports to help you reach clients more effectively.
- **Legacy App:** Return to Legacy Covetrus Comms to access areas not yet updated: Reviews, Media Center, Desktop Assistant Download, and Setup.
- **Help & Support:** Access Covetrus Comms Support contact information, user guides, and videos.

KPI Summaries



Weekly Summary

The Weekly Summary always reflects an account of the previous 7 days (the end date is always today). Tiles will only appear if the activity/service has active data to report. Tiles may include:

- **New Clients:** The number of new clients added to the PIMS within the past 7 days. The dollar value reflects the total transaction revenue posted for these clients in the past 7 days.
- **Confirmed Appointments:** The number of appointments in the past 7 days with a confirmation status received via Covetrus Comms (manual status change to "confirmed" in the PIMS is not counted here). The dollar value reflects the total transaction revenue posted for these clients in the past 7 days.
- **Online Appointments:** The number of appointments that took place in the past 7 days which were booked via online. The dollar value reflects the total transaction revenue posted for these patients.
- **Reactivated clients:** The number of clients that received a reactivation email in the past 7 days and booked an appointment.
- **Reminders Fulfilled:** The number of patients seen in the past 7 days that fulfilled any reminders sent on an automated reminder message in the past 60 days. The dollar value reflects the total transaction value posted for these patients.
- **Reviews Received:** Any reviews received in the past 7 days.

Acquired Value

Demonstrates income generated (total transaction revenue posted) in the connected PIMS, for the past 7 (weekly) or 30 (monthly) days. This is updated daily.

Monthly Totals

Summarizes the same key client engagement stats as the week summary, but instead shows the past 30 days compared to 30 days before that (this month vs. last month, rolling).

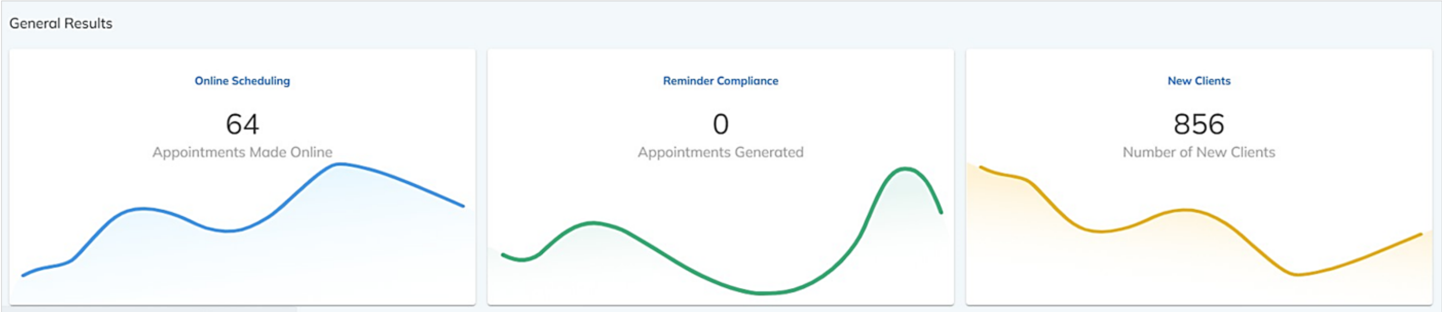
Communications by Media

Weekly activity is based on the channel: emails, phone calls, text messages, and postcards.

Communications by Type

Weekly activity based on communication type: vaccine reminders, appointment reminders, welcome messages, appointment confirmations, patient reactivations, surveys, on-demand messages, and birthday messages.

General Results



Shows the lifetime value of Covetrus Comms in the key areas of appointments made online, appointments generated because of a reminder, and new clients acquired. Click each tile to see additional details.

Online Scheduling

- Number of appointments booked online by month.
- Percent of appointments booked online by appointment type/reason.
- Online appointments booked by source (web vs. app).

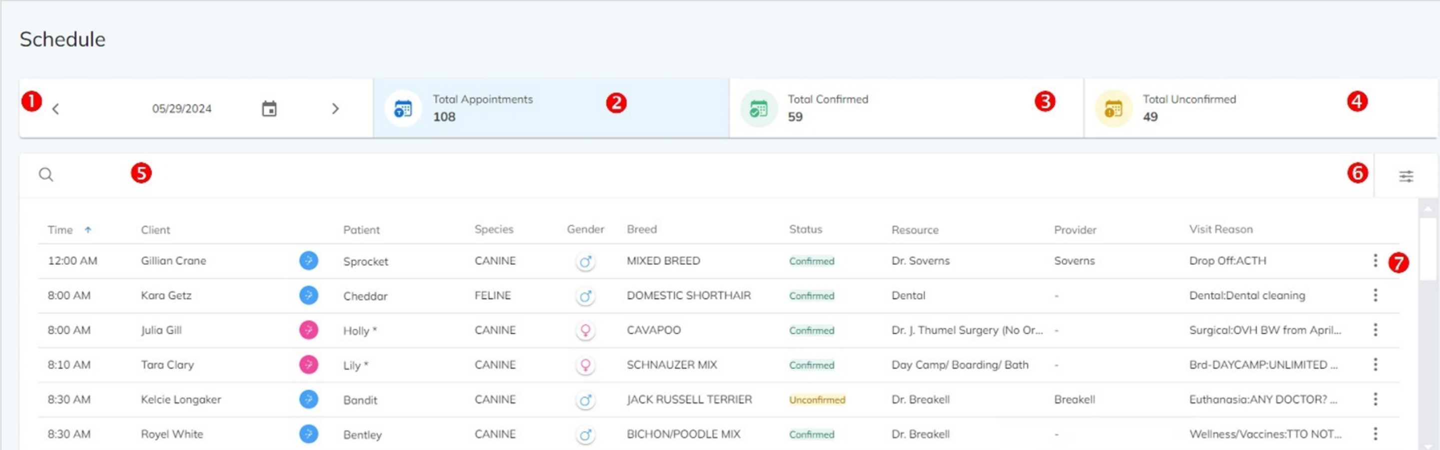
Reminder Compliance

- The number of appointments generated following a healthcare reminder being sent.
- Acquired annual revenue generated (incrementing monthly) set against the number of appointments each month that occurred because of a reminder being sent.

New Clients

- Total number of new clients added monthly, set against the total annual new clients (incrementing monthly).
- Number of new clients added each month via online booking, set against the total annual new clients (incrementing monthly) added via online booking. A practice may elect not to allow new clients to book online – if this is the case, this graph will be empty.

Schedule



1. Click the arrows to move from day to day, click the date to type in a specific date, or click the calendar icon to open the date picker.
2. Click to display all appointments for the day selected. This page will default to 25 rows per page but can be adjusted from 10 to 100 rows per page (use the rows per page and page advance at the bottom right).
3. Click to display only the confirmed appointments for the day.
4. Click to display only the unconfirmed appointments for the day.
5. Click to search for a specific client or patient name.

6. Click to filter the list by either resources or providers. If filters are active, a red dot will appear on the filter icon.

7. Click for additional actions such as Send Message, Convert to Virtual Visit, Manage Visit, Start Visit.

    a. **Send Message:** Send an on-demand message by email, text and/or phone. There are 26 message templates to choose from, or a message can be constructed from scratch.

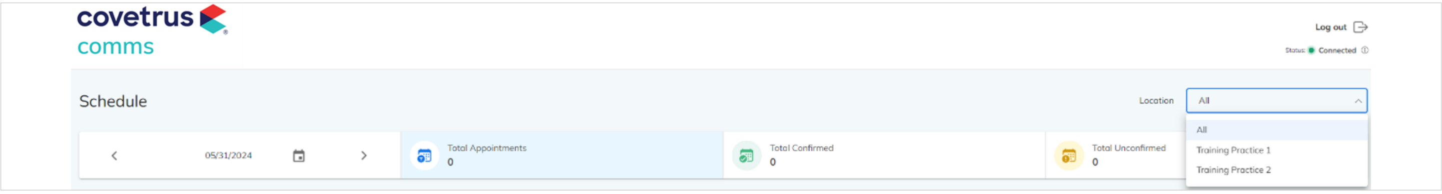
    b. **Convert to Virtual Visit:** Convert a scheduled appointment into a virtual visit. Once the appointment has been converted into a virtual visit, it will have a camera icon to the right of the appointment reason, as shown below. At that point, different options are available:

        1) **Manage virtual visit:** Send the virtual visit invitation to both the client and the provider. If the client or provider phone is known, it will be prepopulated, otherwise you can enter it where requested and click Send Invite. Invitations are sent by text and email to both doctor and client, and contain the URL link to access the virtual visit.

        2) **Start Visit:** Click to begin the visit, note virtual visit in Comms is completely separate from any virtual visit setting or feature in the PIMS.

Multi-Site Support

In multi-site accounts, there is also an option to filter the schedule by location. Simply click the Location drop-down at the top right of the page, as shown.



Requests

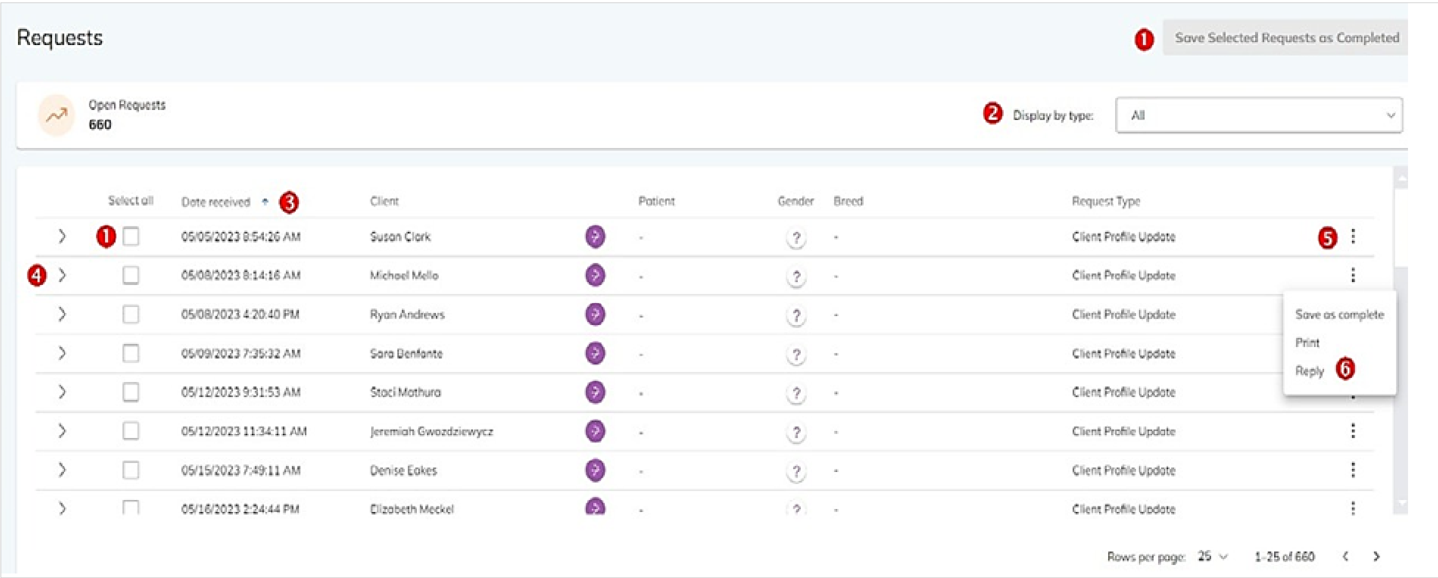
Open Requests

Requests can be sent by clients via Pet Portal or the MyPetsWellness App. These requests fall into nine Request Types:

- **Appointment:** For practices using the "Appointment Request" model rather than integrated online booking, clients will request a date and approximate time of appointment, which the practice must then review, book, and verify manually.
- **Appointment Confirmation:** Available only for practices that are not configured for online scheduling. Displays when the client has confirmed their appointment. Practices using integrated online booking will see appointment confirmations in the schedule and the PIMS – they do not show here as open requests.
- **Appointment Cancellation:** If the practice has allowed cancellation in their online booking configuration, this notice will appear if the client cancels an existing appointment.
- **Boarding:** When enabled by the practice, a client may request a boarding booking.
- **Certificate:** The client has requested a copy of the patient's vaccination certificate.
- **Grooming:** When enabled by the practice, a client may request a grooming appointment.
- **Prescription Refill:** When enabled by the practice, a client may request a prescription refill of medication previously prescribed and dispensed in-clinic.
- **Client Profile Update:** The client has supplied a change to their name or contact details.
- **Pet Profile Update:** The client has provided a change to their patient details.

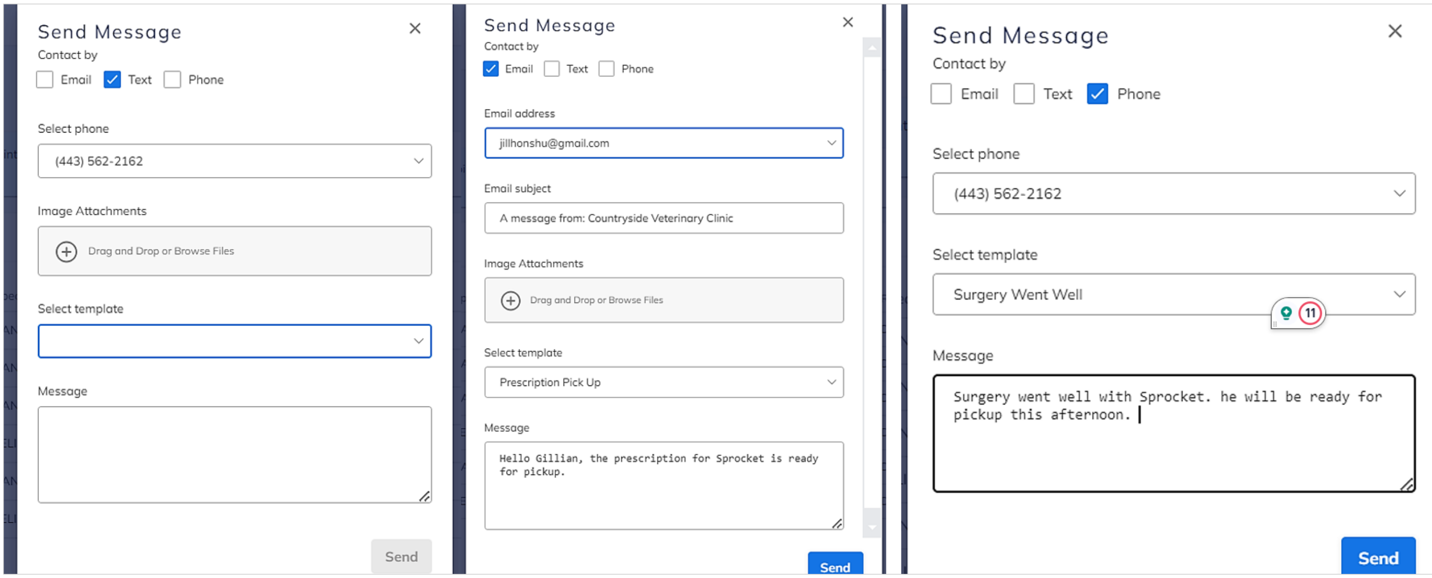
All requests are also copied to the practice's notification email address.

Open Requests List



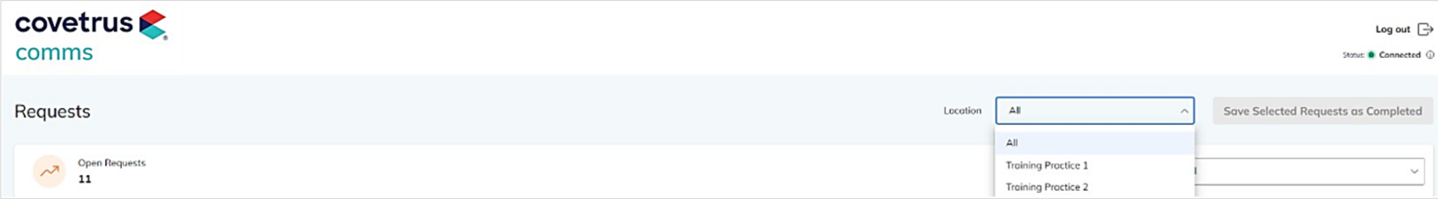
The count of open requests will increase in the Menu badge as well as at the top of this page, which shows only open requests. Requests can be cleared from this page and archived with the Summary report by marking them as completed.

1. Click the check box to mark one or more requests as completed, then click Save Selected Requests as Completed to finalize.
2. Use the drop-down menu to filter the list of open requests by request type.
3. Click the column headers to filter the list of open requests in ascending or descending order.
4. Click the > arrow to display the details of the request.
5. Click for additional options: Save the individual request as complete, print the request, or reply to the request.
6. You can reply by email, text, and/or phone. There are 26 message templates to choose from, or a message can be constructed from scratch.



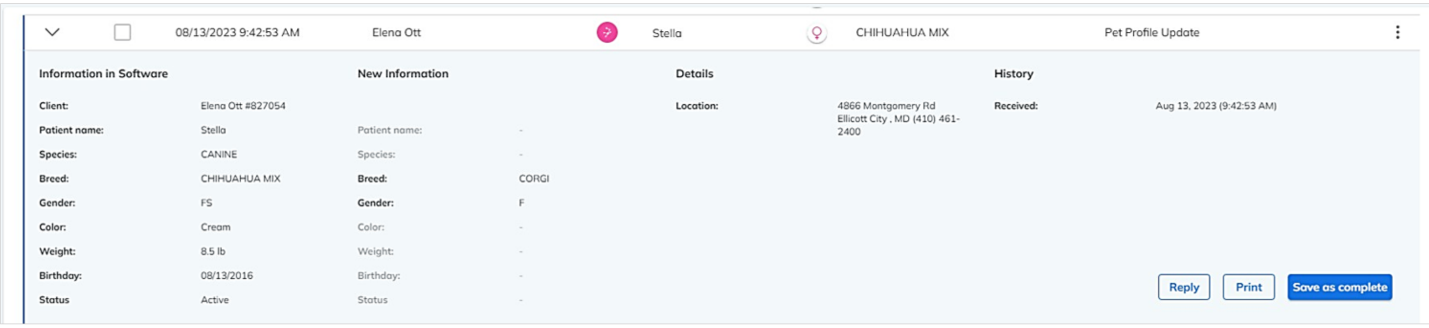
Multi-Site Support

In multi-site accounts, there is also an option to filter the open requests by location. Simply click the location drop-down at the top right of the page, as shown.

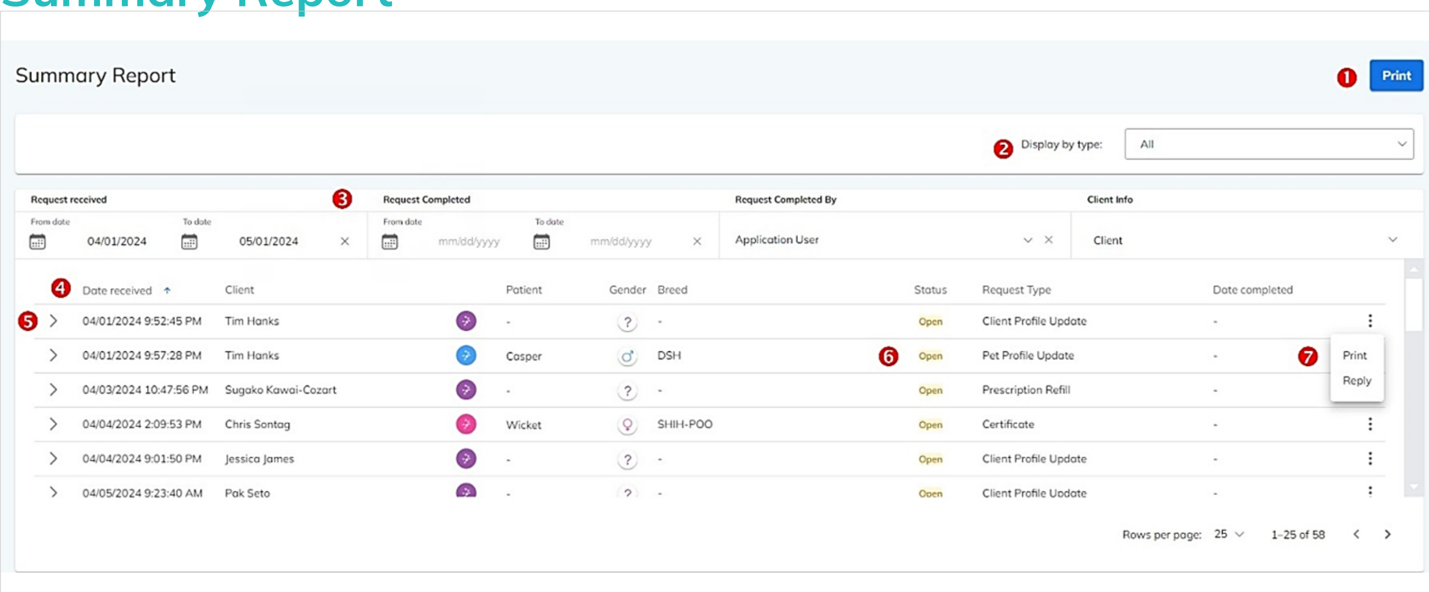


Open Request Detail

Request details will vary based on the nature of the request. In the case of a client or patient profile update, the current information in the PIMS will be displayed, alongside the added information submitted by the client. For all request types, changes can be made manually in the PIMS.



Summary Report

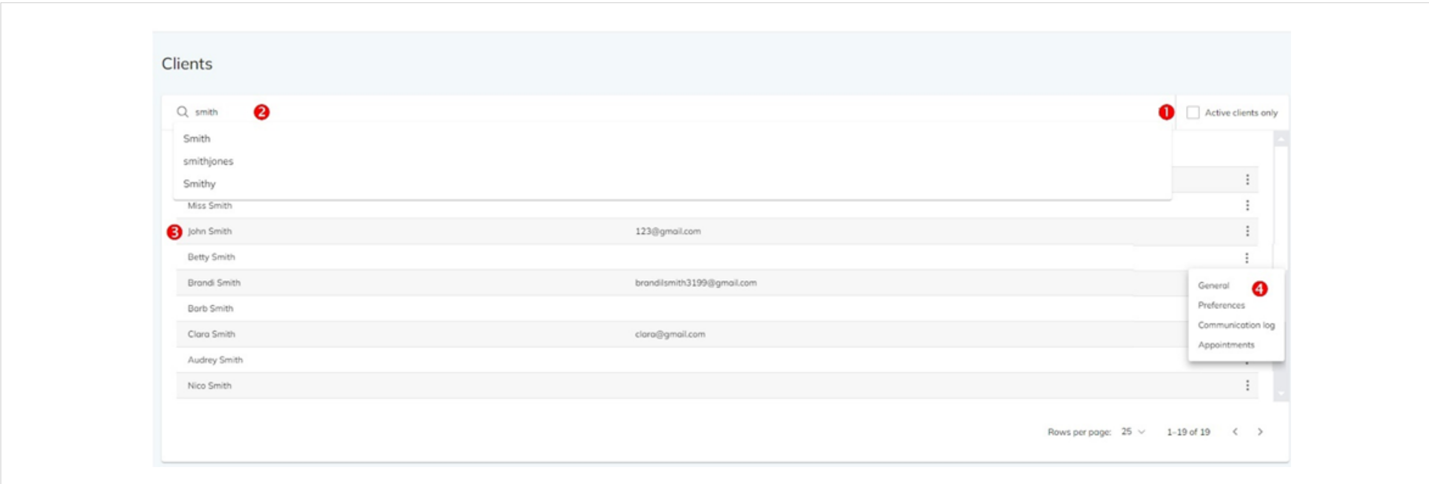


The Summary Report shows both open and completed requests. However, requests cannot be completed from the Summary Report – this must be done from the Open Requests page.

1. A list of the requests can be sent to a local or network printer. A maximum of 500 requests can be printed at one time; if over 500 requests are shown, the print button will be disabled. Use filters to limit the records displayed.
2. Use the drop-down to choose only one request type to display.
3. Filter the list by one of the following criteria:
    a. Date the request was received (sent by the client).

   b. Date the request was completed by practice staff.
   c. Covetrus Comms user that completed the request (which user was logged in when the request was marked complete).
   d. Client details: name, ID, email, or phone number.
4. Sort any column in ascending or descending order.
5. Click the > arrow to display the details of the request.
6. Determine whether the request is open or completed.
7. Print or reply to the request (see previous section for details).

Clients



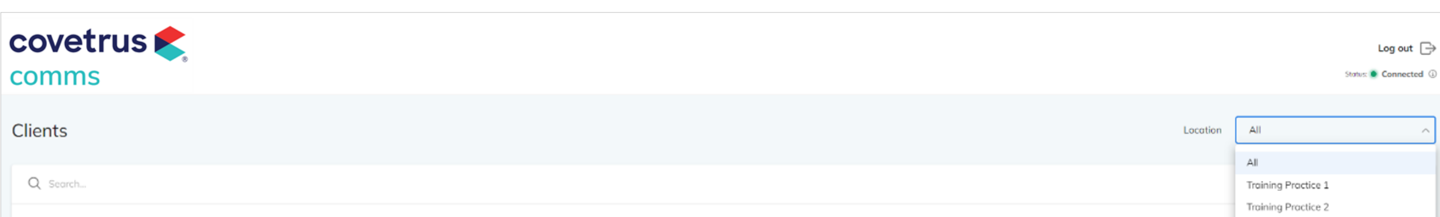
Client Search

To find details about a client or patient, begin with the client search.

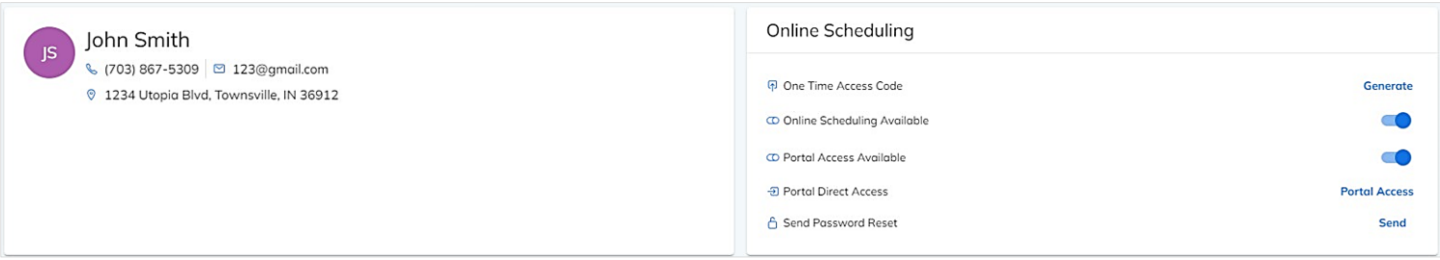
1. Choose to search through all clients, or active clients only.
2. Search by the client's first or last name. As you search, possible exact matches will appear below the search box, and all potential matches will populate dynamically in the record list.
3. Click on the client's name to access the full client record.
4. Click for more options, to jump directly to either the general preferences, communication log, or appointments for that client.

Multi-Site Support

In multi-site accounts, there is also an option to filter the client search by location. This will limit the search to only clients whose set home location matches the selection. Simply click the location drop-down at the top right of the page, as shown.



Client Details

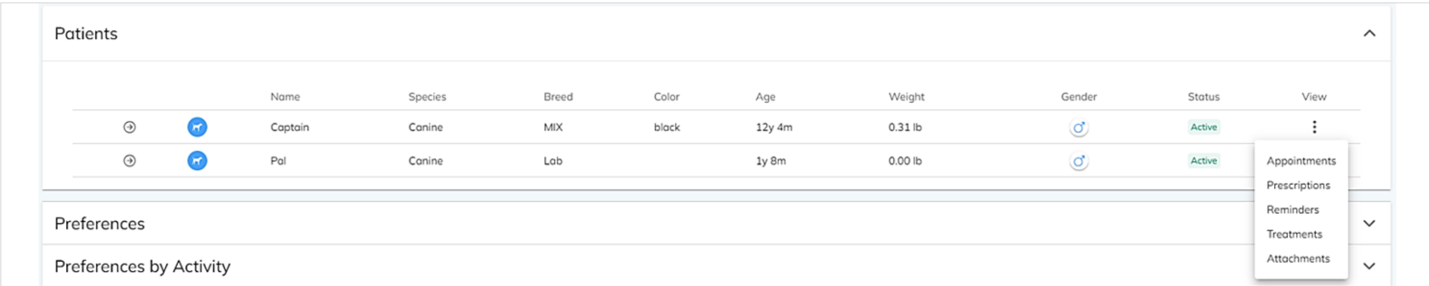


General client details include the client’s name, phone number, email address, and physical address. Click the phone icon to send a text message to the client or click the email address to send an email message.

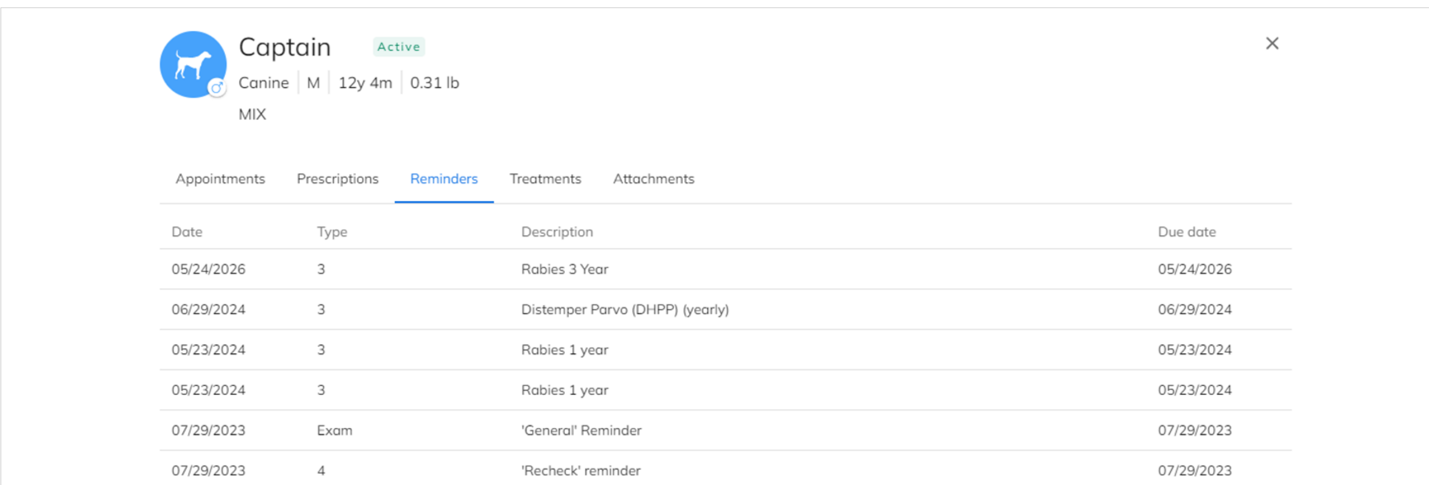
The client’s Pet Portal settings can also be set from this section, including:

1. One-Time Access Code: Click generate to create an access code for the client to log into the MyPetsWellness app.
2. Allow or prohibit online scheduling for this client (where online scheduling is enabled overall)
3. Allow or prohibit Pet Portal access for this client.
4. Directly connect to this client’s Pet Portal, to see exactly what they see in their portal. This link is only for Covetrus Comms Pet portal, it will not link to GreatPetCare portal.
5. Send Password Reset: click to send a reset email if the client no longer can access their Covetrus Comms Pet Portal.
   - Click the ▼ arrow to expand any of the sections below the general details.
   - Click the ▲ arrow to close any section.

Patients

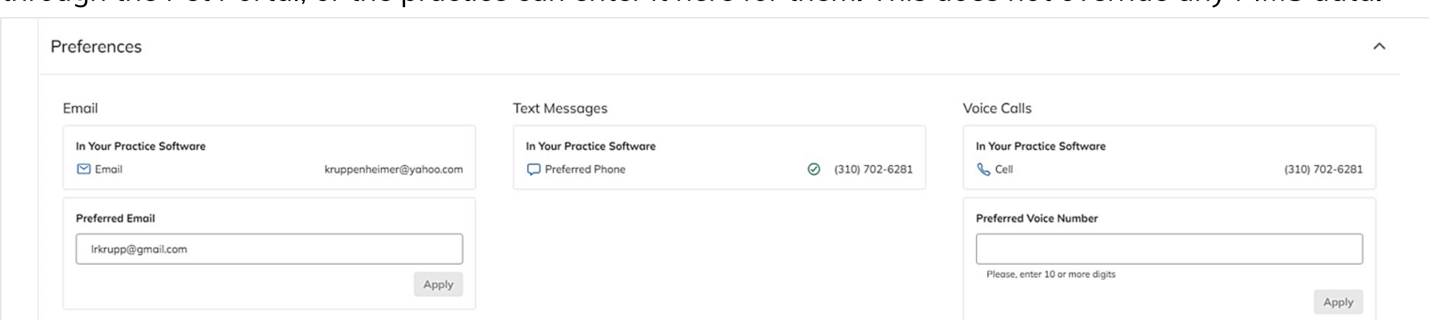


Expand the Patient section to view the patients belonging to a client, shown in alphabetical order. Basic details are displayed, including patient status. To view additional information, click on the arrow at the far left or choose from the View menu to jump to specific information such as appointments, prescriptions, reminders, treatments, or attachments. A patient details window will appear with tabbed headings for each of these details – the active tab will be shown in blue.



Preferences

Preferences reflect the preferred email, SMS, and voice numbers to contact the client. For automated communications from Covetrus Comms, the client can provide a different email address or phone number through the Pet Portal, or the practice can enter it here for them. This does not override any PIMS data.



Preferences by Activity

These preferences further refine how Covetrus Comms contacts a client for specific types of emails. What is shown here should mirror what the client has chosen in their Pet Portal; alternatively, practice staff can modify it for them here. All channels are shown for all activity types; however, this is first managed by what messages the practice chooses to send as a rule. For example, a client may elect to receive postcard patient reminders, but if the practice does not send postcards at all, then the client will still not receive postcards.

Preferences by Activity

	Appointment Reminders	Pet Reminders	Practice messages	Marketing
Email	☑ Accept	☑ Accept	☑ Accept	☑ Accept
Text	☑ Accept	☑ Accept	☑ Accept	☑ Accept
Phone	☑ Accept	☐ Accept	☑ Accept	☐ Accept
Postcard	☑ Accept	☑ Accept	☑ Accept	☑ Accept

Apply

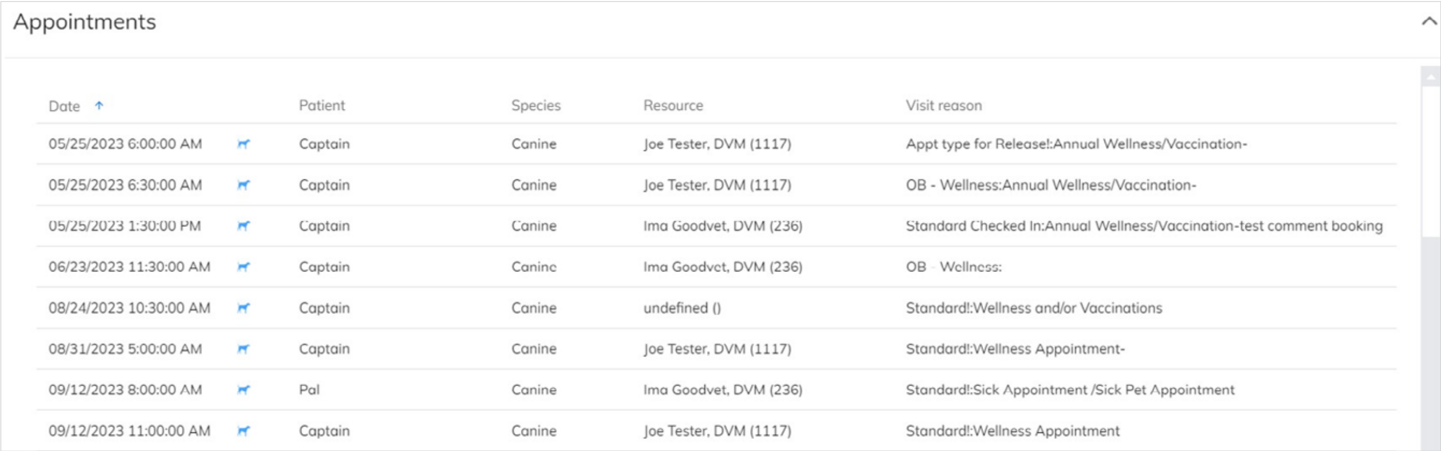
Communication Log

The Communication Log is sorted in chronological order (most recent message first). A green arrow indicates a message from the practice to the client; a red arrow indicates a message from the client to the practice. Click the message envelope to view the contents of the message.

Date	To/From	Event	Media	Status	Msg.
1/31/2025 7:16 PM	**client@email.com**	Email Opened	Email	received	
1/31/2025 7:09 PM	**client@email.com**	Survey Invite	Email	email opened	
1/30/2025 2:54 PM	**123 Address St., City, ST, 90...**	Health Care Reminder	Postcard	sent	
1/28/2025 5:52 PM	**(987) 654-3210**	Appointment Reminder	Phone Call	sent	
1/28/2025 5:48 PM	**(987) 654-3210**	Client Message	SMS	received	

Appointments

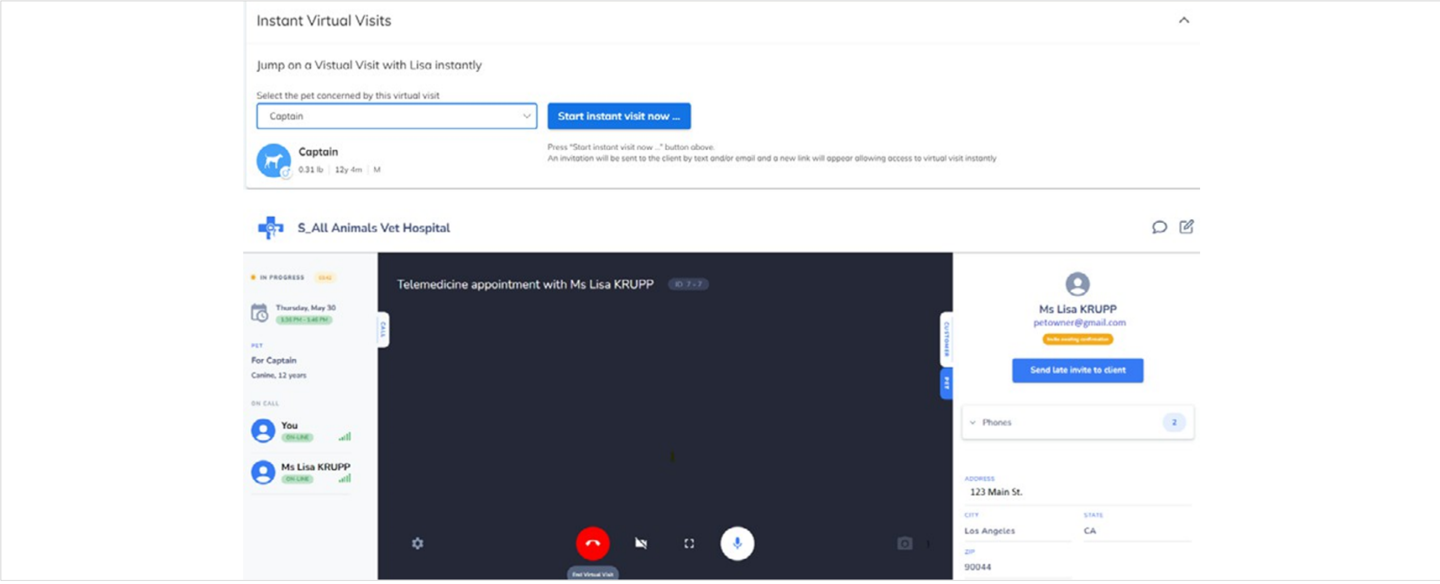
The appointments section lists all past and future appointments for all the clients' patients. It is sorted chronologically. Click the **Date** column header to reverse the sort (oldest to newest or newest to oldest).


Appointments

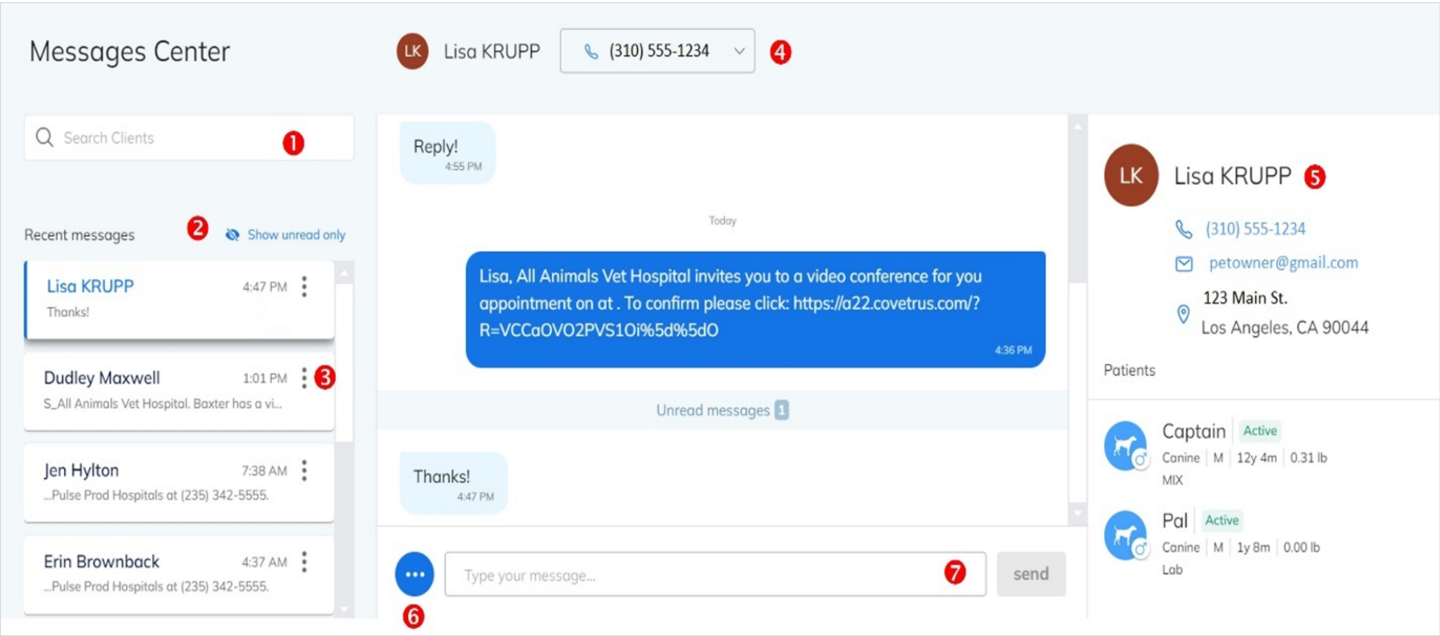
Date ↑		Patient	Species	Resource	Visit reason
05/25/2023 6:00:00 AM		Captain	Canine	Joe Tester, DVM (1117)	Appt type for Release!:Annual Wellness/Vaccination-
05/25/2023 6:30:00 AM		Captain	Canine	Joe Tester, DVM (1117)	OB - Wellness:Annual Wellness/Vaccination-
05/25/2023 1:30:00 PM		Captain	Canine	Ima Goodvet, DVM (236)	Standard Checked In:Annual Wellness/Vaccination-test comment booking
06/23/2023 11:30:00 AM		Captain	Canine	Ima Goodvet, DVM (236)	OB - Wellness:
08/24/2023 10:30:00 AM		Captain	Canine	undefined ()	Standard!:Wellness and/or Vaccinations
08/31/2023 5:00:00 AM		Captain	Canine	Joe Tester, DVM (1117)	Standard!:Wellness Appointment-
09/12/2023 8:00:00 AM		Pal	Canine	Ima Goodvet, DVM (236)	Standard!:Sick Appointment /Sick Pet Appointment
09/12/2023 11:00:00 AM		Captain	Canine	Joe Tester, DVM (1117)	Standard!:Wellness Appointment

Instant Virtual Visits

Choose from the drop-down menu of active patients to start an instant virtual visit with the client. A message will be sent to the client by text or email, and the visit will begin in a new browser tab.



Messages



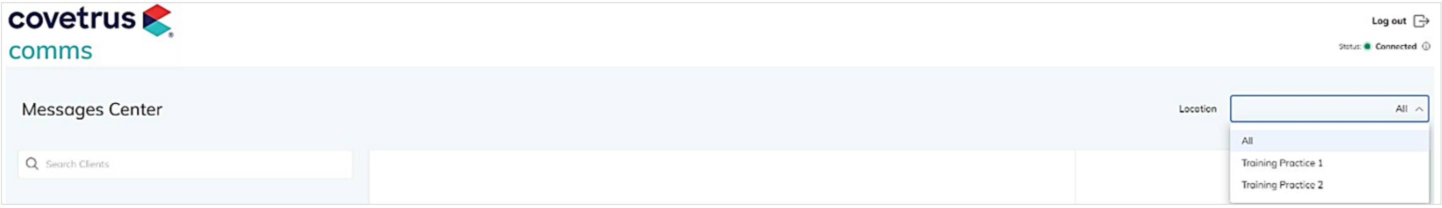
All most recent conversation at the top, and any conversations with clients within 30 days will appear. Unread messages are marked with a red badge.

1. To find a client to begin (or continue) messaging, type the client's first or last name. As you search, possible exact matches will appear below the search box, and all potential matches will populate dynamically in the results list. Click the client's name to select.
2. The recent messages list can be filtered to show only unread messages, making it easier to quickly find and respond to incoming messages.
3. Click the vertical ellipsis to find more options: Pin a chat to the top of the list or mark a chat as unread. Chats can only be marked as unread if the most recent message has come from the client.
4. Click the drop-down menu to choose which phone number (or virtual chat, to chat with a client via the MyPetsWellness app) to contact. Messages cannot be viewed or created unless a contact number is selected.
5. View basic information about the client and their patient(s). Click the client's name to bring up the client profile (see Client Details, above, for more information about this feature).
    a. Click the client's phone number to send an automated voice message to the client.
    b. Click the client email address to send an on-demand email message to the client.
    c. Click a patient name to bring up additional information about that patient.

6. Click the ellipsis for more options:
    a. Start a virtual visit.
    b. Send a share link to invite the client to post an attachment to the Covetrus Comms patient record (does not post to PIMS client or patient record).
    c. Access one of the 26 message templates to instantly send a standard message.
    d. Send an image to the client.
7. Type a freeform message in the message box and click the send button.

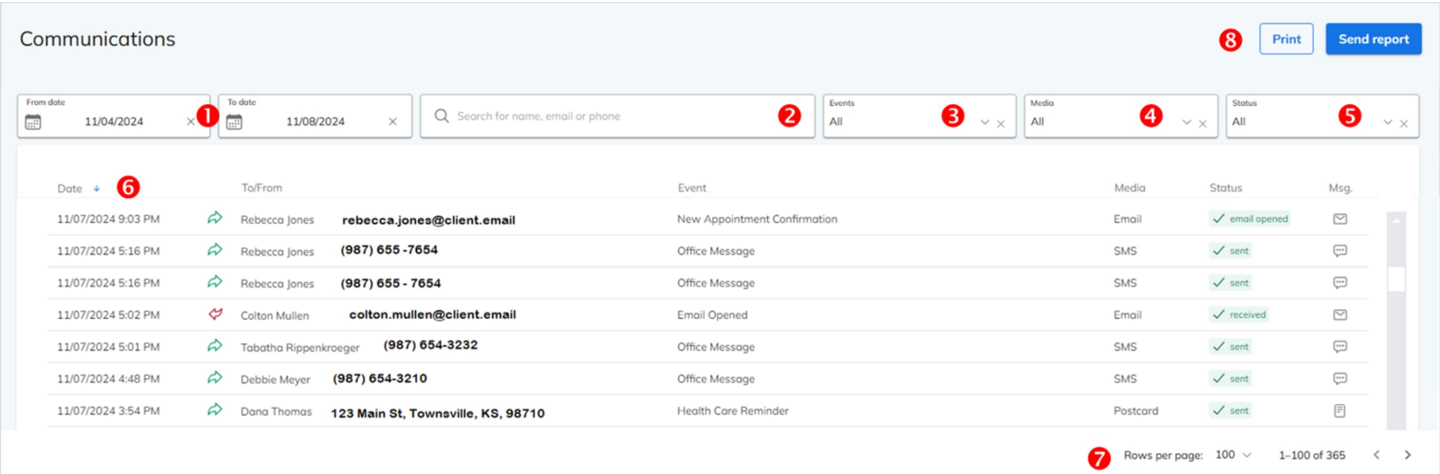
Multi-Site Support

In multi-site accounts, there is also an option to limit the Message Center by Location. This will limit the search to only clients that are assigned the selected location as their “home”, and will also limit the view of recent messages to only those from clients assigned to that “home” location. Simply click the Location drop-down at the top right of the page, as shown.



Reports

Communications



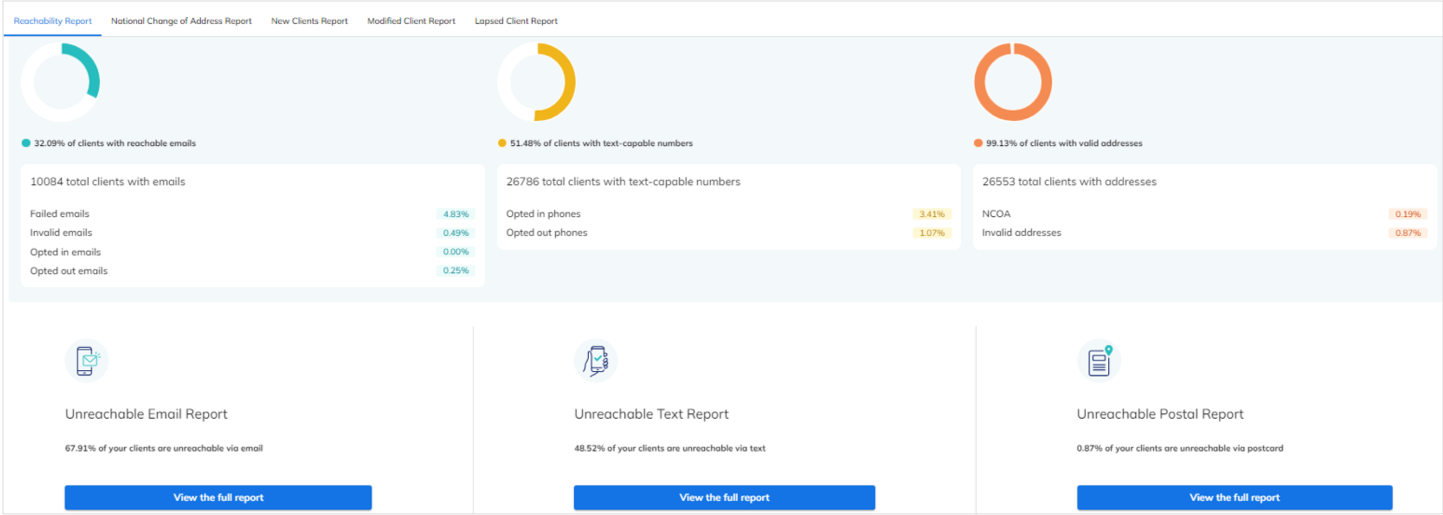
The Communications Report provides a complete history of all communications sent by the practice for a given date range. It is an *all clients* version of the Communication Log found on the individual client record described above. This report can be filtered, sorted or viewed in a number of different ways:

1. **View a date range:** Leave date range blank to view all records. Enter an increment of one day to view a single day (ex: 02/04/2025-02/05/2025 to view all records for Feb 4) or enter a wider range using the calendar tool to search more broadly.
2. **Search a client:** Search for records containing a client's full or partial name, email or phone number.
3. **Search events:** Events are the category of outgoing message. Limit search results to any combination of the following:
   - Appointment Reminder
   - Follow Up
   - Health Care Reminder
   - Birthday
   - Welcome
   - Reactivation
   - Office Message (chat)
   - Survey Invite
   - Google Invite
   - New Appointment Confirmation
   - OTAC Request (App Code)
   - Password Reset

   → Response events can be seen when All is selected, such as **email opened**, **confirmation received**, etc. Response events are not available for filtering.
4. **Search media:** Limit search results to the type(s) of media sent – email, SMS (text), phone call, postcard, magazine, or mms (image).

5. **Status:** Filter by sent, received, or failed messages
6. **Sort by Date:** Click column header to view results in ascending or descending order
7. **Rows per page:** Click the drop-down to increase or decrease the number of records displayed at one time. Click the left and right arrows to move between pages.
8. **Print or send report:** After filtering, click the print or send buttons to send a PDF copy of the report to an email address or local or network printer.

Clients- Reachability Report



The Reachability Report is broken down into reachability by media type. Click on the colored percentages or **View the full report** buttons to see a detailed list of the clients that fall into each of the different metrics.

Email Reachability

- **Total clients with emails:** The number of active clients with any value in the email field (good or bad).
- **% of clients with reachable emails:** The percentage of active clients with a valid email address.
- **Failed emails:** The percentage of total clients with emails (see above) that are undeliverable due to bounces, invalid domains, timeouts, etc.
- **Invalid emails:** The percentage of total clients with emails (see above) that are undeliverable due to poor address construction such as typos, invalid characters, multiple addresses in one field, spaces, etc.
- **Opted in / Opted out emails:** Provided for Canadian practices that require express opt-in for email communication. Opt-in is not requested for US practices, and so this metric is always 0%. Opt-outs are counted when a client removes email from their messaging preferences in their Pet Portal.
- **Unreachable Email Report:** Measures all active clients against those with either invalid, failed or no email address.

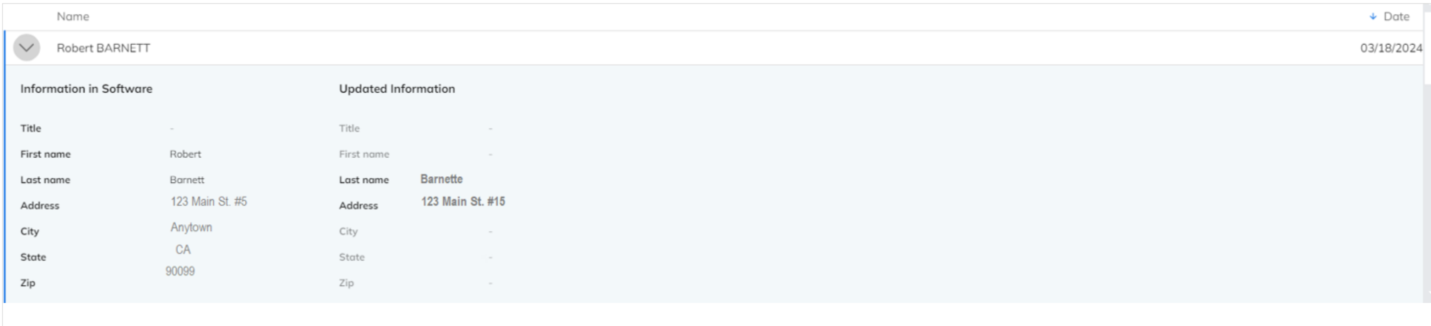
Text Reachability

- **Total clients with text-capable numbers:** The number of active clients with at least one text-capable number (according to carrier lookup).
- **% of clients with text-capable numbers:** The percent of active clients with at least one text-capable number (according to carrier lookup).
- **Opted in phones:** The percent of active clients with at least one opted in phone number. While chat and appointment reminders can be sent to any client, by law only opted in phone numbers are eligible to receive text healthcare reminders.
- **Opted out phones:** The percent of active clients that have opted out a phone number.
- **Unreachable Text Report:** Measures all active clients against those that are unreachable by text. Report detail includes all phone numbers available in the PIMS along with unreachable reason, such as ‘not SMS capable’ or ‘opted out’.

Direct Mail Reachability

- **Total clients with valid address:** The number of active clients with a complete and properly formatted postal address.
- **% of clients with valid address**: The percent of active clients with a complete and properly formatted postal address.
- **NCOA:** The percent of active clients that have been sent reminder postcards which have been updated by the USPS National Change of Address registry. The detail report for this metric includes the original PIMS address as well as the updated forwarding address and the date of update.
- **Invalid addresses:** The percentage of active clients with improperly constructed addresses, including missing fields such as city, state, or zip, as well as active clients with no address at all.
- **Unreachable Postal Report:** The percentage measures all active clients against those that are unreachable by postcard. Report detail includes all unreachable active clients along with unreachable reason, such as ‘no address’ or ‘invalid’.

National Change of Address Report

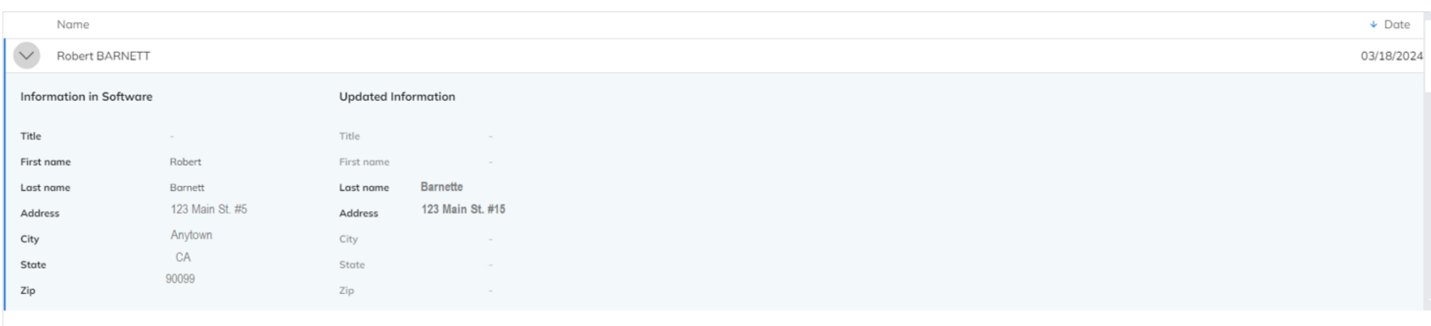


The National Change of Address Report (NCOA Report) is a post-processing report returned by the printing house after reminder postcards are sent. It reflects any change of address filed by clients with the USPS, and provides the practice with both the current address in PIMS as well as the forwarding address on record with USPS. It is recommended that practices follow up with the client to confirm the change of address and then update the PIMS record accordingly. By default, if a change of address is on record with USPS, any reminder postcard will automatically be updated to the newer address to ensure maximum deliverability.

New Clients Report

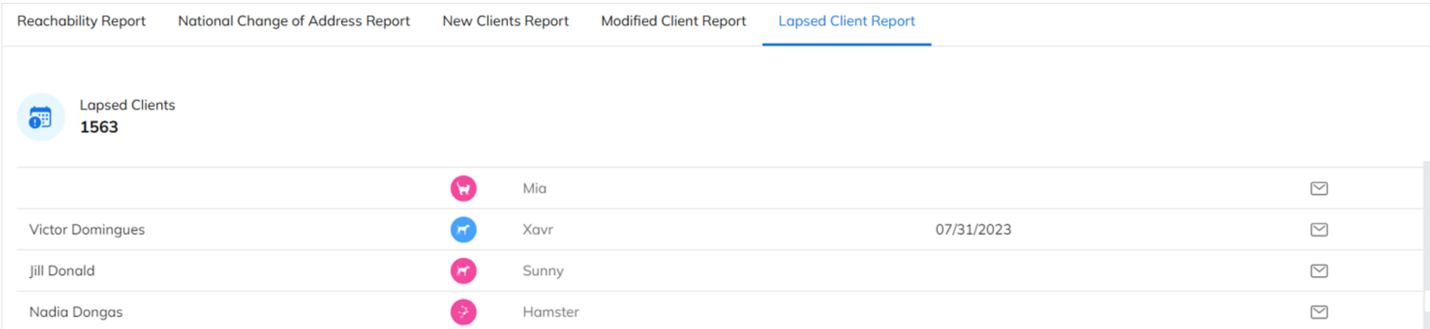
The New Clients Report provides a chronological account of all new clients added to the PIMS, including client name, address, phone and email address.

Modified Client Report



The Modified Client Report is sortable by client name or by date, and provides a side-by-side account of any changes to client details (such as name, address, etc.) submitted by the client in the Pet Portal. Any changed information is called out in bold to the right of the original PIMS details.

Lapsed Client Report

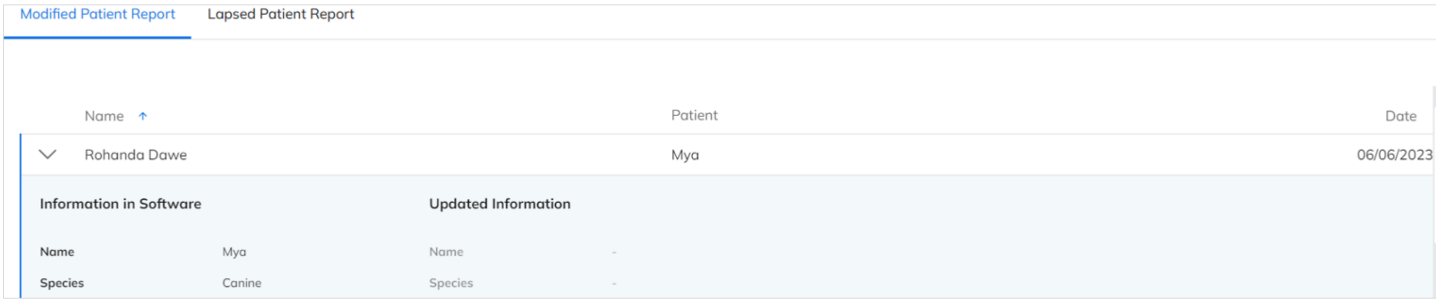


The Lapsed Client Report provides a list of clients that have not visited the practice in 18 months or more. When available, a last visit date is displayed. When no last visit date is available, this means that it has been more than 36 months since the client's last visit, since that is the furthest back Comms syncs full client activity. Click the message envelope on the far right to message the client.

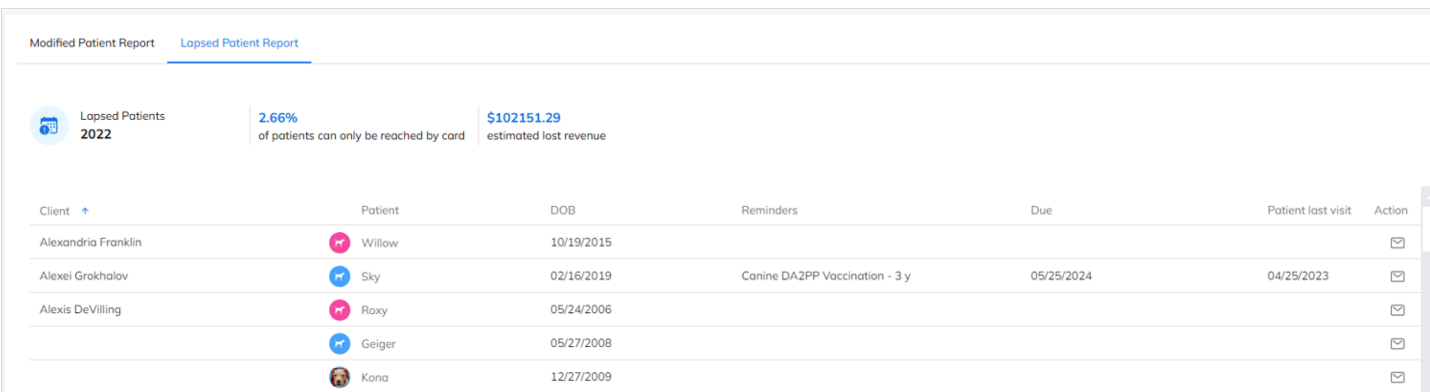
Patients

Modified Patient Report

The Modified Patient Report is sortable by client name or by date, and provides a side-by-side account of any changes to patient details (such as name, species, etc.) submitted by the client in the Pet Portal. Any changed information is called out in bold to the right of the original PIMS details.



Lapsed Patient Report



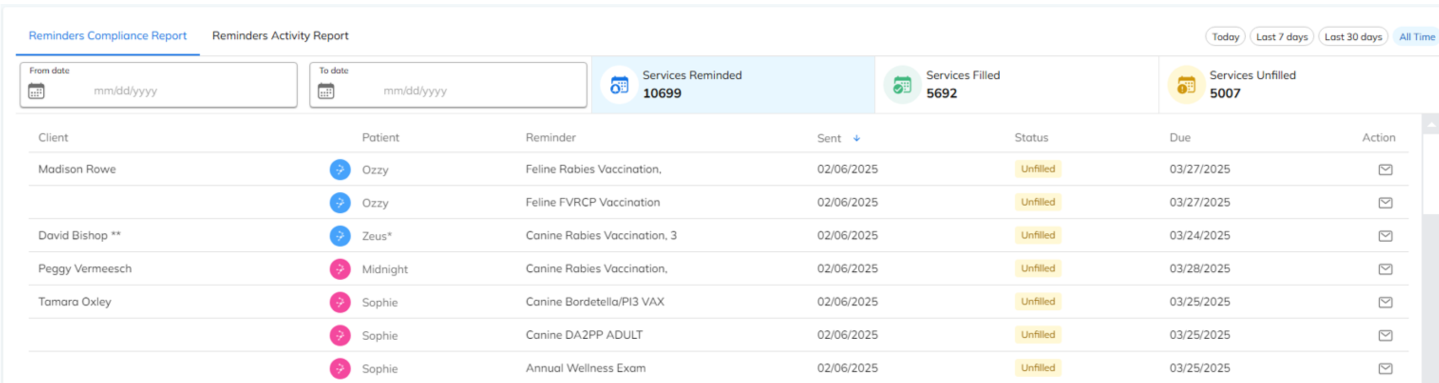
The Lapsed Patient Report lists patients that have not visited the practice in 18 months or more. In the header of the report is a total count of lapsed patients, as well as two key performance metrics:

- **% of patients can only be reached by card:** These are patients for whom the practice does not have a valid email or opted-in text number on record.
- **Estimated lost revenue:** Where reminders due are present, Comms looks at the average transaction amount for those reminder codes and adds that amount to the total lost revenue estimate. Actual lost revenue is always higher than estimated, because not all due reminders are available to be counted.

When available, the patient's overdue reminders, due dates, and last visit dates will also be provided. These overdue reminders are used in the estimated lost revenue calculations described above. When no reminders or last visit date is available, this means that it has been more than 36 months since the patient's last visit, since that is the furthest back Comms syncs full patient activity. Click on the patient name to get full patient details. Click the message envelope on the far right to message the client.

Reminders Report

Reminders Compliance Report

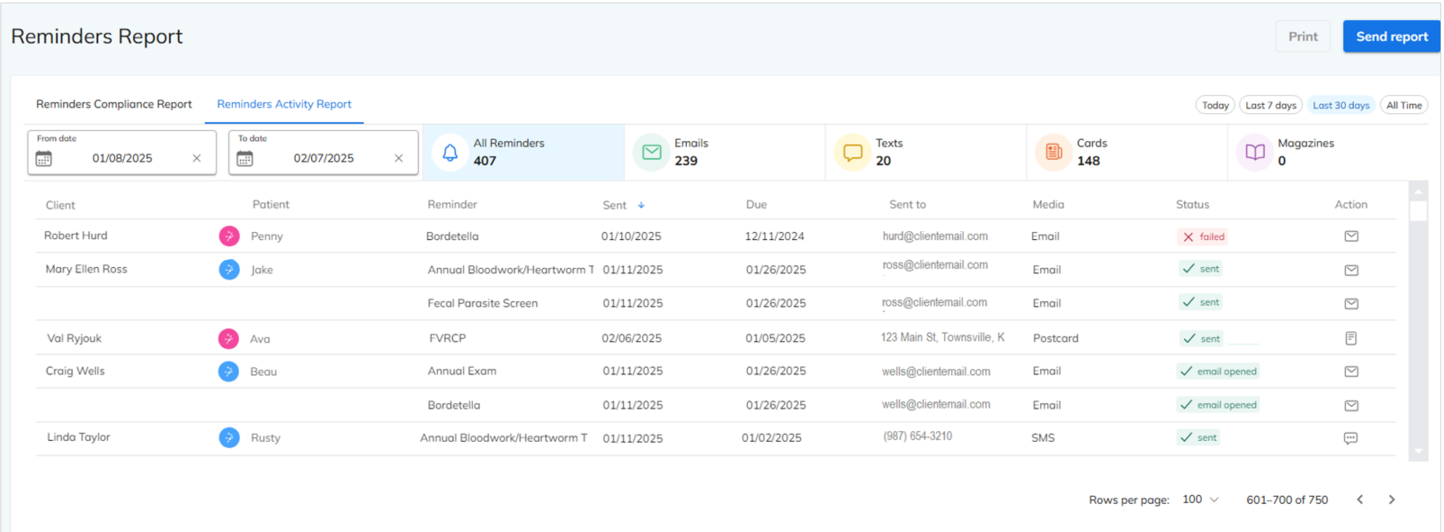


The Reminders Compliance Report displays any services with at least one reminder sent, the date the message was sent, the Status (Filled or Unfilled), the date the service was due, and an option to easily send the client a follow-up email, text or voice message if desired.

The search range (including each quick range button at the top right of the report) refers to the date the reminder message was sent to the client. In the case where multiple reminders are sent (multi-sequence and/or multi-channel reminder configurations), this date will reflect the most recently sent message.

- **Services Reminded** is the number of services (not patients) reminded in the date range. Click this tile to see all records in the date range.
- **Services Filled** is the number of services that were reminded in the date range that have since been updated. Click this tile to see only the filled records in the date range. Reminders are considered filled if the reminder ID associated with the communication (as assigned by the PIMS) is no longer active, or if its due date has changed.
- **Services Unfulfilled** is the number of services that were reminded in the date range that have not yet been updated. Click this tile to see only the unfulfilled records in the date range.

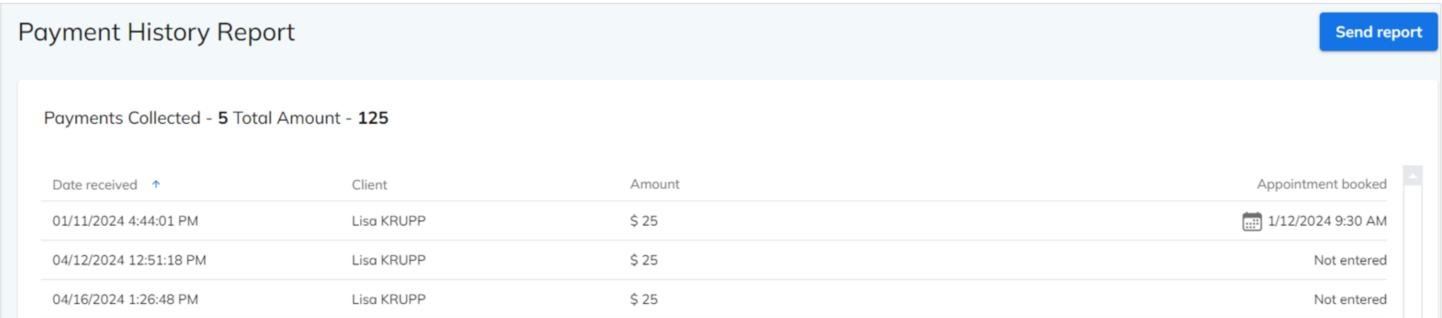
Reminders Activity Report



The Reminders Activity Report serves three key functions.

1. **Check reminder volumes:** Enter a date range or use the quick range buttons at the top right of the report to get a total of all reminders sent, and a breakout of reminders by media channel (email, text, and postcard) for that range. Click the channel buttons to filter the list of records below.
2. **Check mailing status:** Quickly determine if a particular reminder was sent, opened, or undeliverable by checking the status column.
3. **Review content:** Click the media icon under the Action column to see the content of the reminder. Emails and text messages will include full content, postcards will list only the patient(s) and service(s) included on that mailing.

Payment History Report



The Payment History Report provides a log of deposits that have been collected from integrated online scheduling. Any practice with an online scheduling-enabled communications package, as well as Covetrus Payments, may utilize this feature. The online scheduling module can be configured to request a deposit for all bookings or only new clients, and all appointment reasons or only certain ones.

- This report can be sorted by date (in ascending or descending chronological order) or by client (in ascending or descending alphabetical order).
- Click Send Report to email the Patient History report to a practice staff member to aid in payment reconciliation.

Multi-Site Support

In multi-site accounts, there is also an option to filter the schedule by location. Simply click the location drop-down at the top right of the page, as shown.