

Receptionist Training Checklist

Name:
Vet Manager:
Preceptor:

Welcome to NewDay Veterinary Care! We are excited to have you as part of our family. As a veterinary receptionist you will be the “face” and “voice” of the clinic. During this training your Veterinary Manager or Preceptor (someone qualified to train) will provide you with all the information you need to be successful. If at any time you have questions about your training please reach out to your Veterinary Manager or our Senior Manager of Training and Learning, Rosie Harrison.

Please initial the following once you are **proficient** explaining or performing the task listed. VM or Preceptor please initial the following only after the trainee can explain or perform the duties listed.

| Week 1 Onboarding | Date | Trainee | Trainer |
|---|------|---------|---------|
| <p>Welcome</p> <p>Clinic Tour/Vet Team Introductions</p> <ul style="list-style-type: none"> ➤ Veterinary Manager ➤ Veterinarian(s) ➤ Veterinary Technicians/Assistants ➤ Veterinary Receptionists ➤ Tour Clinic- Show the following areas and any explain any applicable rules for each area <ul style="list-style-type: none"> - Surgery Suite - Radiology - Kennel room - Treatment Area <ul style="list-style-type: none"> - Lab area - Pharmacy - Receptionist Area ➤ Personal belongings <ul style="list-style-type: none"> -Where to store personal belongings, lunch etc. ➤ Receive clinic phone list <ul style="list-style-type: none"> - Confirm your cell phone number with manager - Be added to clinic group text (if applicable) | | | |
| <p>Resort Tour/ Team Introductions</p> <ul style="list-style-type: none"> ➤ Resort Manager ➤ Assistant Manager(s) ➤ Supervisors ➤ Associates ➤ Groomers ➤ Tour Resort <ul style="list-style-type: none"> -Wings -Breakroom -Review Emergency Exits/Evacuation Map | | | |
| <p>Hours of Operation</p> <ul style="list-style-type: none"> ➤ Normal Hours/Days Open ➤ Surgery Days ➤ Holiday Hours | | | |

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|---|--|--|--|
| ➤ After-Hours Emergency | | | |
| Password List | | | |
| Acknowledge receipt of password list from manger | | | |
| UKG | | | |
| Log in | | | |
| How to clock in/out | | | |
| Confirm Bank Information/ Direct Deposit | | | |
| Confirm Emergency Contact Info. | | | |
| How to request time off | | | |
| How to view timecard/paystubs | | | |
| How to view employee schedule | | | |
| Dress Code | | | |
| Review & Acknowledge uniform/shoe/nametag requirements with manager | | | |
| Benefits | | | |
| To access: The Park > Careers/Development > Hiring & Onboarding > New to the Pack> Pet Paradise Perks Discuss with your manager ➤ Initial once understood | | | |
| Employee Handbook | | | |
| Review the employee handbook, initial once understood ➤ To access: The Park > Careers/Development > Hiring & Onboarding > New to the Pack> Employee Handbook | | | |
| Outlook Email | | | |
| ➤ Log in to your personal NewDay email- check daily for important updates | | | |
| ➤ Log in to the clinic email | | | |
| ➤ Acknowledge that monitoring the clinic email is your responsibility as the receptionist | | | |
| ➤ Any client communication should be responded to within 2 hours | | | |
| ➤ All communication with the client should be documented in the pet's medical record. | | | |
| ➤ Call back requests for a DVM/Para staff should be documented as a TASK on the TASKBOARD in PULSE and assigned to the appropriate party. | | | |
| ➤ Prescription Requests should be documented in the TASKBOARD within PULSE. Notify owner of a 24-48 hour approval/fill time. | | | |
| Pet Paradise University | | | |
| Access training assignments/videos - HR videos must be completed within first 2 weeks of employment | | | |
| The Park | | | |
| Access The Park | | | |
| Review each tab | | | |
| Review content of Newday Vet Care tab: This will be a great resource during your training | | | |

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| Employee Support and Success | | | |
| Acknowledge the following once your manager has explained each item: | | | |
| Periodic check-ins with Manager of Training and Development during training period. | | | |
| 90-day introductory period and monthly/quarterly one-on ones with manager. | | | |
| Annual performance review and pay increases. | | | |
| Veterinary Training Manual | | | |
| Chapter 1- Client Service and Phone Etiquette | | | |
| Read Chapter 1 at Pet Paradise University or on The Park | | | |
| Complete Ch. 1 (Weeks 1-2) of Training Manual Checklist by end of week 2 (upload in PPU) | | | |
| Shadow a receptionist (if applicable) when not actively working on training videos/courses | | | |
| Familiarize yourself with the phone system | | | |
| ➤ Observe/ Demonstrate how to answer the phone "Thank you for calling NewDay Veterinary Care at (enter location), this is _____, how may I help you?" | | | |
| ➤ Observe/ Demonstrate how to place someone on hold | | | |
| ➤ Observe/ Demonstrate how to transfer a call to another extension | | | |
| ➤ Review vaccine protocols for this location | | | |
| ➤ Review what procedures (surgeries/dentals/etc.) are performed at this location | | | |
| ➤ Intro to Wellness plans- Acknowledge once you have the basic awareness of Wellness Plans and what they provide | | | |
| Ring Central | | | |
| Log in | | | |
| Review Ring Central with trainer and how it is utilized | | | |
| PULSE | | | |
| Log in | | | |
| Watch training video in Pulse -Access Pulse home screen> "?" (bottom right corner) >Videos> "Back to Basics" Initial once complete. | | | |
| Create a new client account in PULSE for yourself | | | |
| Add your pets to your client account | | | |
| Make a "test" appointment for your pet. (delete once complete) | | | |
| Acknowledge that All conversations with clients should be recorded in the pet's medical record under "Communication" Demonstrate how to input a client communication | | | |
| Demonstrate how to enter a call back request on the TASKBOARD | | | |
| Gingr | | | |
| Log in | | | |
| Watch training video in Gingr. Initial once complete | | | |

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| Week 2 | | | |
| Resort Operations | | | |
| Review The NewDay + Pet Paradise Alignment Guide | | | |
| Acknowledge importance of the partnership between resort and vet services and how that communication is vital | | | |
| Review and Acknowledge the process for each of the following: - Health Write Ups - EOD email - Manager huddles | _____ | _____ | _____ |
| Shadow FOH at resort for 2 hours. Vet Manager to set up. | | | |
| Date of Shadow: | | | |
| Pet Identification | | | |
| Acknowledge the following name tag/collar colors and their meaning | | | |
| Blue- Veterinary | | | |
| Yellow-Aggressive | | | |
| Pink- Has a prescription | | | |
| Green- 8 years or older (not on a prescription) | | | |
| Orange- Daycare | | | |
| Purple- Grooming | | | |
| White- all others | | | |
| Health Write-Ups | | | |
| Read page 34 in the Veterinary Training Manual | | | |
| Review/Acknowledge the steps of an HWU with trainer | | | |
| Demonstrate how the HWU is noted in the patient's chart (PULSE & Gingr)? | | | |
| Observe the HWU process (tech exam, call to owner, communication entry etc.) with a vet assistant | | | |
| Preventative Care | | | |
| Vaccine Protocols | | | |
| Read pages 29-31 in Veterinary Training Manual on Vaccine Schedules | | | |
| Review/Acknowledge what vaccines are required to board at Pet Paradise | | | |
| Explain vaccine schedule for a puppy with your trainer | | | |
| Explain vaccine schedule for a kitten with your trainer | | | |
| Intestinal Parasite Exams (Fecal Test) | | | |
| Read pages 38,40-41 in the Veterinary Training Manual on parasites | | | |
| Review/acknowledge why it's important to recommend an intestinal parasite exam at least annually | | | |
| Acknowledge the importance of asking owners to bring fecal samples to their annual appointments to make the visit more pleasant for the pet | | | |
| Preventatives- see "cheat sheet" in resources | | | |
| Review the following with your trainer: | | | |

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| Week 3-4 | | | |
| Wellness Plans | | | |
| Read Ch. 1 of Wellness Plan Playbook (Access through The Park) | | | |
| Review the following with your trainer: Wellness plan pricing and what they include | | | |
| How the old plans will transition to current plans at time of renewal | | | |
| Log in to Covetrus Care Plans | | | |
| Review page 10-11 in Veterinary Training Manual on how to sign up a wellness plan. | | | |
| Observe a team member signing up a wellness plan | | | |
| Sign up a patient on a wellness plan in Covetrus Care Plans - Process the payment | | | |
| Gingr-Add WP icons: red heart, majenta syringe | | | |
| Give resort credits as applicable | | | |
| Pulse | | | |
| Watch video on creating an estimate Pulse>"?" at Bottom Right>Resource Center>Videos>Estimates | | | |
| Create a "test" estimate for a canine annual visit | | | |
| Create a "test" estimate for a canine spay (50lbs) | | | |
| Create a "test" estimate for a feline dental cleaning with radiographs | | | |
| Prescriptions | | | |
| Read page 35 in the Veterinary Training Manual | | | |
| Pulse- Review "Prescriptions" training in Pulse, initial once complete "?" Bottom right>Resource Center>Train Your Staff>Prescriptions | | | |
| Fill a prescription for a "test" patient | | | |
| Review/Acknowledge your doctors' rules for refilling medications | | | |
| Review where all medications are stored in your hospital ➤ Eye meds ➤ Ear meds ➤ Oral meds- antibiotics, anti-inflammatories etc. ➤ Shampoos ➤ Supplements | | | |
| Show where meds are stored until picked up by owner | | | |
| Miscellaneous Programs/Websites | | | |
| Care Credit | | | |
| Log in information | | | |
| Take Credit Certification | | | |
| Review/Demonstrate how to look up client's information | | | |
| Review/Demonstrate how to invoice a client using Care Credit | | | |
| Chewy Practice Hub | | | |
| Log in information | | | |
| Review with trainer how to use Chewy hub to look up a medication | | | |
| Acknowledge how to approve a client initiated prescription | | | |
| Demonstrate to how to preapprove a clinic initiated prescription | | | |
| Vetsource | | | |

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| Log in information | | | |
| Review with trainer how to use Vetsource site to look up a medication | | | |
| Demonstrate how to order a prescription through Script Share | | | |
| Trupanion | | | |
| Take Trupanion Certification Course | | | |
| Log in information | | | |
| Review/Demonstrate steps for submitting an Exam Day Offer (EDO) | | | |
| Review/Demonstrate steps for submitting an estimate | | | |
| Review/Demonstrate how to submit a payment through Trupanion | | | |
| End of Life Process | | | |
| Read Ch. 6 in Veterinary Training Manual | | | |
| Review the following with your trainer: | | | |
| Acknowledge location of "Euthanasia in progress" sign/candle | | | |
| Acknowledge your scheduled day for pick-up of remains | | | |
| How long does it take for cremains to be returned to the clinic? | | | |
| Review and Acknowledge with your trainer the euthanasia process from scheduling the appointment to informing owner that the cremains have arrived for pick up. | | | |
| Review how to enter information for cremation | | | |
| Daily Responsibilities | | | |
| Review and Acknowledge the following daily responsibilities as a receptionist: | | | |
| As the "face" of the clinic it is your responsibility to be present at the NewDay reception desk at all times. The only exception is to ask a quick question then you should return up front. | | | |
| Monitoring clinic email, responding asap- document in medical record | | | |
| Call backs- put on TASKBOARD | | | |
| Rx Refills- put on TASKBOARD, Notify owner of 24-48 hour approval/fill time. | | | |
| Appointment Confirmation Calls- Review and acknowledge steps for the various types of confirmation calls <ul style="list-style-type: none"> • All appointments for the following day should be called prior to 12pm the day before the appointment. • Document all communication with client in the record • Use "status" type within scheduler to reflect if the appointment was confirmed, canceled, or if a voice message was left. • New appointments: ensure we have previous medical history or ask where we can call to get them from • Remind owners to bring fecal/urine samples if applicable Surgery Appointments: <ul style="list-style-type: none"> • Remind owners of what time to drop off the patient • Remind owners to NPO patient the night before the surgery • Verify with owner if any other services are needed during appointment (nail trims, anal gland expression, ear cleaning etc.) | | | |

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| <p>Appointment Driving Review/Acknowledge with your trainer the responsibility to help make/drive appointments for your clinic. Note the following examples of contacts that can be made during slower times to help make appointments:</p> <ul style="list-style-type: none"> ➤ Check upcoming boarders for vaccines that are due in the near future. Notify client and offer to get that appointment scheduled. ➤ Check pets that had a dental at least one year ago and call to see if owner is ready to schedule the next one. ➤ Top Paw- Get information from resort on their Top Paw Customers (Top 3%) <ul style="list-style-type: none"> -Check Pulse to see if they are NewDay clients <ul style="list-style-type: none"> - If not our client, call to introduce NewDay and introduce our services to them. - Invite them in to meet the doctor +/- tour of the hospital. - If they have upcoming reservations, check to see if due for vaccines. If so, then when calling to introduce NewDay, offer to make an appointment to update their pet's vaccines. ➤ Meet The Fam Ambassador <ul style="list-style-type: none"> - Discuss the "Meet the Fam" program with your trainer - Get a list of the "Meet the Fam" participants for the next day - Make arrangements/ remind FOH that you will speak to the Meet the Fam clients when they arrive. - If possible, give a tour of the hospital and introduce the Meet the Fam clients to the doctor if he/she is available. | | | |
| <p>Checking in Appointments- Review and acknowledge the process for checking in a patient:</p> <ul style="list-style-type: none"> ➤ Welcome/Greet client and patient ➤ Verify patient information (DOB, Address, best telephone number, email address etc.) ➤ Provide client with New Client Form if applicable ➤ Collect previous records/history/documents from client ➤ Weigh patient ➤ Place client and patient in a <i>CLEAN</i> exam room ➤ If not a Wellness Plan patient: Give client a short introduction on our wellness plans and the flyer to look over while they wait for the vet assistant to come in. ➤ Alert VA staff of patient's arrival ➤ Add patient weight etc. to whiteboard (if applicable) ➤ Update medical record with newly received information <ul style="list-style-type: none"> - Scan in collected records/history/documents from client (return hard copy to client) - Update vaccine history in Pulse and Gingr if needed | | | |

