



Veterinary Manager Training Manual Checklist

WEEK 1 CHECKLIST Complete with Regional Vet Manager	Date	VT/VA Initials	Trainer Initials
Welcome!			
Meet your team			
Review Mission, Vision, Commitment & Core Values			
Review and acknowledge employee handbook			
Veterinary Manager Blueprint			
Job Description- Read and acknowledge			
Dress code- Read and acknowledge			
Benefits			
Review and acknowledge Benefits flyer			
Regional Veterinary Manager			
Initial once the below meetings have been explained:			
1. 30,60,90 Day Meetings			
2. Monthly/Quarterly 1:1			
3. Annual Performance Review/Merit Increase			
Contacts			
Log in and access Outlook email			
Establish contact with preceptor and set up initial call. Preceptor: _____			
Review Headquarters Team			
Review Veterinary Leadership Team			
Review Veterinary Manager Contact Sheet			

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Clinic Operations			
Read the job description for each of the following positions. Initial once the duties of each position are understood.			
1. Veterinary Receptionist			
2. Veterinary Assistant			
3. Veterinary Technician (CVT, RVT, LVT)			
Meet with your clinic doctors to learn what services/surgeries are performed at your clinic.			
Resort Relationships			
Meet and introduce yourself to the resort manager.			
Meet and introduce yourself to the resort assistant managers.			
Set up bi-weekly or monthly meetings with resort manager.			
UKG			
Log in to UKG			
Show the ability to:			
1. View employees			
2. Request time off			
PIMS			
Log in and create password			
View Pulse software training videos			
Show the ability to:			
1. Create a new client/patient			
2. Access reminders			
3. Input a communication			

WEEK 1 CHECKLIST Complete with Regional Vet Manager	Date	VT/VA Initials	Trainer Initials
Gingr			
Log in and create password			
Watch Gingr software training video			
Show the ability to:			
1. Search for client/patient			
2. Identify client/patient icons and their meaning			
3. Create a reservation			
Pet Paradise University			
Log in to Pet Paradise University			
Review your assigned courses			
Complete courses within assigned timeframe			
Congratulations on Completing Week 1!			

WEEK 2 CHECKLIST	Date	VM Initials	Trainer Initials
Resort Relations			
Schedule FOH (front of house) shadow with resort.			
Schedule BOH (back of house) shadow with resort.			
FOH- Front of House			
Observe the process for checking a guest in.			
Observe the process for checking a guest out.			
Identify the different colors of pet identification collars and list what they mean:			
1. White			
2. Yellow			
3. Orange			
4. Blue			
5. Pink			
6. Green			
7. Purple			
Review resort rates:			
1. Boarding dog			
2. Boarding cat			
3. Day camp			
4. Grooming			
What is the importance of the 3 day call?			
Review the resort icons in Gingr and their meanings.			
BOH- Back of House			
Observe and acknowledge intake and exit exams.			
Participate in/understand the disinfecting of suites.			
Participate in/understand the disinfecting of yard.			
Understand and acknowledge play yard standards.			

WEEK 2 CHECKLIST	Date	VM Initials	Trainer Initials
Health Write Ups			
Review the health write up outline.			
Observe the steps of an HWU.			
Complete all steps of a health write up.			
SharePoint			
Demonstrate how to access Sharepoint.			
Demonstrate the ability to access folders which you will need frequently.			
Review the content of each folder.			
Veterinary Manager Timeline			
Review timeline			
1. Note when manager duties are due.			
2. Put due date reminders in your calendar.			
Inventory/Budgeting			
Demonstrate how to access the following vendors:			
1. MWI			
2. Zoetis			
3. Amazon			
4. Airgas			
5. Drummond (Storefront)			
6. Hills			
7. Outside reference laboratory (Idexx/Antech)			
Establish an inventory ordering procedure/timeframe.			
Budget Tracker			
Obtain the budget tracker.			
Attend a training session with preceptor.			
Utilize budget tracker moving forward.			

WEEK 2 CHECKLIST	Date	VM Initials	Trainer Initials
The Park			
Log in to The Park			
1. Familiarize yourself with all the tabs.			
2. Access NewDay Veterinary Care tab.			
UKG			
Accessing employee timecards:			
1. Demonstrate steps to approve missed punches.			
2. Demonstrate how to perform timecard corrections.			
3. Demonstrate steps for bi-weekly timecard approvals.			
Demonstrate how to input Employee Schedule.			
Demonstrate how to upload documents to employee file.			
PIMS			
Demonstrate how to input vaccine history in patient's file.			
Create an estimate/treatment plan with the Standards of Care packages.			
Demonstrate converting an estimate/treatment plan to the invoice.			
PIMS Reporting			
Demonstrate how to run the following reports:			
1. Accounts receivable			
2. Sales			
3. Inventory			
4. Reminders			
5. Usage			
6. Wellness plan			
Covetrus CarePlans			
Log in			

WEEK 2 CHECKLIST	Date	VM Initials	Trainer Initials
Demonstrate the ability to navigate the portal.			
Create a wellness plan.			
Cancel a wellness plan.			
Congratulations on Completing Week 2!			

WEEK 3 CHECKLIST	Date	VM Initials	Trainer Initials
Clinic Operations			
Team Management			
Labor Management Demonstrate the knowledge of the following:			
1. When to post employee schedule			
2. How to access employee availability request form			
3. How to access employee transfer request form			
Review the steps of a disciplinary conversation with your preceptor/RVM.			
1. How to access the coaching and counseling form			
2. How to fill out the form correctly			
3. How to upload the form to UKG after having the conversation with the team member			
Review the steps of annual performance reviews/merit increases.			
Worker's Compensation			
Show how to access PMA to report a worker's compensation claim.			
Show how to access and fill out the following forms:			
1. MOD Investigation Report			
2. Injury Report			
3. Authorization for Treatment			
HQ Introductions			
Set up introductory call with Melody Eaves.			
Obtain Headquarters Contact List.			
Vet Services Sharepoint			
1. Demonstrate ability to access the Dashboard in Sharepoint.			
2. Demonstrate how to analyze information and set weekly goals.			

WEEK 3 CHECKLIST	Date	VM Initials	Trainer Initials
PIMS			
Invoicing			
Demonstrate how to apply a discount.			
Demonstrate how to make a price adjustment on an invoice.			
Demonstrate how to void transactions.			
Inventory			
1. Demonstrate how to receive inventory.			
2. Demonstrate how to adjust price on received inventory (Cost of Goods).			
Covetrus CarePlans			
Management of Accounts			
Review and acknowledge the steps for wellness plan renewals.			
Review and acknowledge the steps for handling a delinquent account. (Wellness Plan Non-Payment Process slide)			
Review and acknowledge how to handle consumption errors			
Creating User/New Employee			
Demonstrate how to create/enter a new user			
Gingr			
Demonstrate how to create a user/employee			
Email G Team: gteam@petparadise.com to get new employee permissions			
How to access the Vet Services Calendar			
1. Demonstrate how to add slots			
2. Demonstrate how to remove slots			
Demonstrate how to remove credit			
Demonstrate how to remove icons			
Demonstrate the steps on how to apply a refund			

WEEK 3 CHECKLIST	Date	VM Initials	Trainer Initials
Demonstrate how to check a client out without payment (wellness plan)			
Qualtrics			
Demonstrate how to login to Qualtrics			
Explain/Demonstrate how to manage tickets			
Demonstrate how to document tickets			
AwardCo			
Demonstrate how to log in to AwardCo			
Demonstrate how to award points			
Demonstrate how to access points balance			
Congratulations on Completing Week 3!			

WEEK 4-5 CHECKLIST	Date	VM Initials	Trainer Initials
CLINIC OPERATIONS			
Contact and set up meeting with our Veterinary Compliance Specialist			
Jobvite			
Log in/access Jobvite			
Review and acknowledge steps of how to place a job requisition			
Review and acknowledge the process for involving an outside recruiting company (NxtThing Recruiting)			
Review/Demonstrate how to access interview questions in Sharepoint			
Mock interview-schedule with preceptor or RVM			
Review how to discuss an offer with a potential new hire			
Review steps on how to create an offer letter			
Onboarding New Staff			
Review/ acknowledge where to access New Hire Checklist			
Review steps on how to submit I-9 for new hires			
Acknowledge how to order Dosimetry Badges			
Review how to order name tags			
Acknowledge how to order scrub voucher (after 90 days)			
Review how to access Onboarding Guide. (Guide should be printed and put into New Hire Binder)			
New Hire Binder			
Acknowledge what should be included in the new hire binder:			
1. New Hire Checklist			
2. Vet Training Manual Checklist			
3. Check off as tasks are completed			
4. Upload to UKG once completed			

WEEK 4-5 CHECKLIST	Date	VM Initials	Trainer Initials
5. Hospital Contact List			
6. Benefit Sheet			
7. Pet People Perks			
Veterinary Training Manual			
Review how to access the veterinary training manual.			
Leaderboard			
Demonstrate how to access and analyze the information			
Review how to build slide deck for leaderboard presentation			
Attend and present their leaderboard			
Inventory Management			
Acknowledge how to use the transfer log			
Lab Consumable Sheet			
Acknowledge how to track lab consumables			
P & L's			
Deep dive into P & L's with RVM			
Additional Systems			
Mineral Tree			
Understand the process of Mineral Tree Approvals			
Service Channel			
Obtain log in			
Demonstrate process to submit maintenance requests			
Care Credit			
Obtain log in			
Demonstrate how to process a transaction using care credit			
Trupanion			
Acknowledge how to access Trupanion Portal			
Review and demonstrate how to submit a claim			

WEEK 4-5 CHECKLIST	Date	VM Initials	Trainer Initials
Demonstrate how to explain/send exam day offer			
OncoK9			
Demonstrate how to submit through the portal			
Chewy Practice Hub			
Obtain log in			
Demonstrate how to:			
1. Add staff and doctors			
2. Submit and approve orders			
Vetsource			
Obtain log in			
Demonstrate how to:			
1. Add staff and doctors			
2. Submit and approve orders			
Vetstoria			
Obtain log in			
Demonstrate how to edit appointment parameters			
Congratulations on Completing Week 4-5!			