

## Practice Management Lesson II

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### OBJECTIVES/RATIONALE

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Veterinary medicine involves managing business tasks involved with maintaining a veterinary clinic. The student will identify common office procedures occurring in a veterinary practice.

TEKS 121.5 2A, 2B, 2C, 3E, 7A

TAKS ELA 1, 4

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### KEY POINTS

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- I. Office Procedures – a broad term used to group together all duties performed in a business office setting, such as word processing, filing, telephone answering, and billing.
  - A. Business Computer Usage
    1. Computer programs
      - a. Windows
      - b. Word Processing
      - c. Programs specific to veterinary clinics
        - (1) Records
        - (2) Financial
    2. Internet searches
    3. E-mail
  - B. Medical Records – the medical record contains all the significant details about the patient’s life and health history
    1. owner’s name, address, place of employment, and telephone numbers at work and home
    2. animal identification
      - a. name
      - b. sex
      - c. age
      - d. color
      - e. species
      - f. breed
      - g. case number
    3. All medical records are confidential legal documents
    4. Entries must be made in ink.
    5. Errors may be indicated and corrected by drawing a single line through the mistake and initialing.
    6. Computer generated files are now legal in court if properly documented.
  - C. Records Management and Filing
    1. Filing Systems
      - a. Alphabetic filing

- (1) Surname, first name, middle name or initial
  - Smith, John
  - Smith, John B.
  - Smith, Jon
- (2) If a client has more than one animal, they will have multiple files.  
Alphabetize first according to the client's name and then according to the animal's name.
- b. Numerical filing
  - (1) Most will use the consecutive numerical filing system where folders are given a number and then filed in ascending order.
    - 1234
    - 1235
    - 1235.6
    - 1236
- c. Geographical filing
- d. Chronological filing
- 2. Client Folder Preparation
  - a. Each client should have a folder where important documents and paperwork pertaining to the client's animal will be stored
    - (1) Correspondence
    - (2) Vaccination records
    - (3) Payment records
  - b. Each document should be placed in the folder and arranged by date, with the most recent date on top.
- 3. Reminders and Thank-You Notes
  - a. Reminder cards are sent for vaccinations and yearly examinations.
  - b. The practice may send out second and third reminders

## II. Clinical Appearance

### A. Cleaning duties

- 1. front office and waiting room
  - a. Pamphlets and magazines neatly arranged
  - b. Clean furniture arranged for easy traffic
  - c. Clean and attractive pictures and plants
- 2. examination and treatment rooms
  - a. Clean and disinfect tables after each use
  - b. Clean, sterilize and store instruments and equipment
  - c. Replenished supplies
- 3. Laboratory
  - a. Microscopes should be cleaned with lens paper after each use and stored appropriately
  - b. Maintain equipment according to manufacturer's instructions
- 4. Kennels, pens, barns, runways, and livestock areas
  - a. Cleaned daily
  - b. Wash and disinfect all cages
  - c. Sweep and mop floors with disinfectant
  - d. Rake and clean stalls

- e. Provided fresh bedding after each cleaning
- f. Clean and disinfect feeding equipment
- B. Maintenance of Supplies
  - 1. inventory supplies to ensure materials will be available.
  - 2. supplies checked daily
  - 3. monitor dated supplies for expiration
- III. Client Relations – clients play the most important role in the successful operation of a veterinary practice – first impressions are the most important and lasting
  - A. Greeting clients
    - 1. Be prepared for the client when they arrive
    - 2. Provide instructions about the clinic procedures
  - B. Telephone Skills
  - C. Taking Messages –record completely and accurately
    - 1. Caller's name
    - 2. Phone number where the caller may be reached
    - 3. Best time for the caller to be reached
    - 4. Reason for the call
  - D. Scheduling Appointments –kept in an appointment book or on a computer program
    - 1. Date and time of appointment
    - 2. Client's name
    - 3. Client's phone number
    - 4. Reason for visit
  - E. Client Education – proper education is required for the owner to give the animal the best care
    - 1. vaccinations
    - 2. de-worming
    - 3. dental care
    - 4. grooming
    - 5. nutrition
    - 6. exercise
    - 7. care of the aging pet
  - F. Quality and Service
    - 1. Professionalism
    - 2. Assistance
    - 3. Can-Do Attitude
    - 4. Try, try again
  - G. Important details
    - 1. Know client by name and use it
    - 2. Know animal's name
    - 3. Call animal by the correct sex
  - H. Emergencies
    - 1. The animal should be placed in a treatment room as soon as it arrives
    - 2. The owner can provide office information after the crisis has passed.
  - I. Death of a Pet

1. Many clients are willing to accept considerable inconvenience and expense to prolong a pet's life
2. When an animal is very old, hopelessly ill, or extremely uncomfortable, the veterinarian may advise euthanasia
3. Clinic may be responsible for the disposal of dead animals.

IV. Communication

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**ACTIVITIES**

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- I. Complete Role Play Situations
- II. Respond to Customer Service Situations.

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**MATERIALS NEEDED**

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Practice Management Quiz Key

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**ASSESSMENT**

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Practice Management Quiz

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**ACCOMMODATIONS**

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For reinforcement, the student will outline the correct way to perform typical veterinary office procedures.

For enrichment, the student will shadow front office personnel at a veterinary clinic. Report.

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**REFLECTIONS**

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## Patient Medical Record

Case No. _____		
Client Name _____	Address _____	Phone _____
Employment _____	Phone _____	Referred by _____
Animal's name _____	Species _____	Breed _____
Age _____	Sex _____	
<b>Vaccination History</b>		
<u>Date</u>	<u>Vaccination</u>	<u>Revaccinate</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
Date	Fecal Exam Results	Allergies
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
	Dental Care	Other
_____	_____	_____
_____	_____	_____

## Role-Play and Demonstration

**Objective:** Given a role-play situation with another classmate, demonstrate the correct way to perform typical veterinary office procedures, receiving at least five out of six correct according to the checklist.

**Directions:** Demonstrate the correct way to:

- Greet a client
- Answer the telephone
- Take a telephone message

### Scenario #1 — Greeting Clients

Student #1 is a veterinary technician who is filling in while the receptionist is out sick.

Student #2 is a client coming to the clinic for his/her first visit to see the veterinarian.

Student #1 should demonstrate correct procedures involved with greeting a client.

### Checklist for Scenario #1

- Student immediately looked up from other activity.
- Student acknowledged the client with a smile and a pleasant greeting.
- Student used the client's name when the client signed in for his or her appointment.
- Student provided specific instructions as to what the client should do next.
- Student informed the client approximately how long he or she would have to wait.
- Student did not allow the client to wait for over 15 minutes or specified amount of time.

## Role Play and Demonstration

### I. Scenario #2

### II. Answer the telephone

### III. Take a telephone message

Student #1 is a veterinary technician in training.

Student #2 is a well-known client calling to speak with the veterinarian.

Student #1 should demonstrate the correct procedures involved with answering the telephone and taking a message.

### Checklist for Scenario #2

- Student answered phone in 3 rings or less.
- Student identified herself/himself and the veterinary clinic.
- Student was friendly, courteous, and helpful.
- Student appeared to be listening to the caller.
- When taking message, student asked for:
  - Client's name
  - Phone number
  - Best time to call
  - Reason for the call

# Customer Service Situations

## **Situation #1**

A client on the telephone is getting frustrated and asks the veterinary technician, "How did you get this job, anyway?" How does the veterinary technician respond?

## **Situation #2**

Either in person or on the telephone, can the veterinary technician ever speak to a client while chewing something? (It is the last bite of lunch that he/she has been trying to finish for an hour.)

## **Situation #3**

The client insists he is ALWAYS right. How do you respond?

## **Situation #4**

A client asks to speak with the veterinarian saying, "I've explained this problem to at least three people and no one has been able to help me yet!" What do you do?

## **Situation #5**

A coworker says, "This client is being a pain. Will you pretend to be the veterinarian for me? Several clients have complained about me this month and I don't want to get in trouble for a little problem like this." What do you do?

## **Situation #6**

A client has been sitting in the clinic waiting area for 20 minutes. His animal is getting restless and he is obviously tired of waiting. He walks over to you and rudely demands to know how much longer it will be before he can see the vet. How do you respond?

## **Situation #7**

A client has just finished her visit with the veterinarian. She is trying to pay, but her dog is barking and trying to run after a cat in the waiting room. What should you do?

## **Situation #8**

A client calls and asks a question regarding a product you do not know anything about. What do you tell him?

## **Situation #9**

A client asks you what dosage of medicine the doctor wanted him to give his pet. You did not assist with this particular visit and therefore do not know the answer to his question. You request the help of the veterinary technician who assisted the vet. What do you tell him or her?

## **Situation #10**

A client, who thinks all veterinary technicians are useless, tells you how unimportant your services are and just how inadequately you do your job. How do you respond?

# Practice Management QUIZ

**Directions:** Complete the following questions with brief answers.

1. What broad tasks are involved in practice management?
2. What office procedures that occur in a veterinary clinic?
3. Explain how you would greet a client who entered the clinic and walked up to the front desk.
4. What information does a medical record contain?
5. Identify key items of information that should appear on a telephone message.
6. How do you make corrections in a medical record? Why?
7. Explain the difference between the alphabetic filing system and the numerical filing system.
8. List client education areas you should be familiar with.
9. Who is responsible for housekeeping duties? For inventory of supplies?
10. Explain how dated supplies should be rotated.

# Practice Management Quiz - KEY

**1. What broad tasks are involved in practice management?**

- Office procedures
- Clinic appearance
- Client relations
- Interoffice communications

**2. What are office procedures that occur in a veterinary clinic?**

Business computer usage, Word processing, Records management and filing, Telephone answering, Billing, Maintaining medical records, Reminders and thank-you notes

**3. Explain how you would greet a client who entered the clinic and walked up to the front desk.**

Immediately look up and recognize them with a smile and a pleasant greeting. Use their name when they sign in for their appointment.

**4. What information does a medical record contain?**

Owner's name, address, place of employment, and telephone numbers at work and home. It also includes animal identification, such as, the animal's name, sex, age, color, species, breed, and case number.

**5. Identify key items of information that should appear on a telephone message.**

(Any two)

Caller's name, Phone number where the caller may be reached, Best time for the caller to be reached, Reason for the call

**6. How do you make corrections in a medical record? Why?**

Errors may be indicated and corrected by drawing a single line through the mistake and writing "void" over it. It is also a good idea to include your initials over the strikethrough. All medical records are legal documents that are confidential.

**7. Explain the difference between the alphabetic filing system and the numerical filing system.**

The alphabetic filing system classifies patients' folders according to name and then files (or stores) them alphabetically. The numerical filing system assigns each folder (or file) a number. The numbers are cross-referenced to show which client the number stands for.

**8. List client education areas you should be familiar with.**

- |                        |           |
|------------------------|-----------|
| vaccinations           | nutrition |
| worming                | exercise  |
| dental care            | grooming  |
| care of the aging pets |           |

**9. Who is responsible for housekeeping duties? For inventory of supplies?**

All workers

**10. Explain how dated supplies should be rotated.**

Supplies with the shortest expiration date are placed in front.