

Date: _____

VETERINARY RECEPTIONIST CHECKLIST

This receptionist checklist is designed to free up your time to make sure you are not missing calls and allow you to provide pet owners with a great experience.

General Reception

Before practice opens:

- Check voicemail messages from previous day and respond to them
- Fill open appointments, manage cancellations, double bookings and reschedule
- Send out reminders for unconfirmed and confirmed appointments
- Check emails and incoming appointments
- Check cash flow/banking for start of the day
- Switch off out-of-hours phone line/answering machine, and enable phone lines
- Check surgical list - admissions and ensure paperwork is ready for the owner e.g. consent
- Update veterinary team with the appointments for the day
- Send outstanding patient billing statements



During practice hours:

- Gather pet-owner feedback at the end of each appointment
- File all paperwork (Insurance forms, consent forms, inpatient forms, lost/found pets)
- Liaise with wholesale companies regarding deliveries, crematorium companies for body collection and return of ashes

After practice hours:

- Double check schedule and appointments for the next day
- Switch on out-of-hours phone line/answering machine, and disable phone lines
- Complete all paperwork of the day (e.g. consent forms, admission forms)
- Update veterinary team with the appointments for the next day
- Banking at end of the day

New Patient Sign Up

- Create account in practice management software
- Create a new patient chart. Enter all the details into the system
- Capture media history, insurance details and billing information
- Ask and document how they heard about you – reviews, referral, Google ?

COVID-19 Specific

Prior to pet owner arrival:

- Contact clients ahead of their appointment to check on their health conditions (if they have any COVID-19 symptoms - fever, cough, sore throat or shortness of breath)
- If a client or anyone in their family is infected by COVID-19 - offer telemedicine consultation if appropriate
- Ensure all pet-owners are informed of social distancing rules and PPE obligation beforehand (one pet owner per pet)
- Offer online payments, invoices and payment receipts to clients to avoid material exchange
- Ensure there are signs (wall notices or floor stickers) visible to clients in the waiting room regarding any mask mandates and restrictions

On pet owner arrival:

- Inform about social distancing and PPE obligation
- Advise to sanitize or wash hands thoroughly
- Check temperature for fever
- Ensure all pet owners fill in the COVID-19 screening consent form
- Advise to continue wearing a face mask until the end of the consultation
- If allowed inside the practice, ensure pet owners have physically distanced themselves in the waiting room