

Employee Name: _____

Hire Date: _____

Purpose

The purpose of this program is to introduce the Receptionist to the practice and bring them into the hospital's philosophy of care and service. Through this program, the new Receptionist will become familiar with the day-to-day operations, management, and standards of care within our hospital

Although a probable duration is stated for each phase of training, these are meant only as a guide and neither the trainer nor the trainee should sign off on a phase until they feel that they fully understand and are comfortable performing all the job tasks listed.

Phase I - Welcome to Our Practice!

Probable Duration: One Day

Skill/Knowledge	Trainer	Description	Date Training Complete	Trainer's Initials
Parking		Show employee parking area.		
Personal Storage		Provide employee with personal storage space. Discuss protection of personal property at work		
Hospital Orientation & Tour		<u>Orientation</u> - Provide a detailed hospital tour which points out emergency exits, eye wash station, employee restrooms and employee break room. Identify the exam rooms, kennel, surgery/treatment area, pharmacy, radiology, etc. and what each area is used for.		
Introductions		Introduce employee to doctors and other healthcare team members. Identify trainee's immediate supervisor.		
Required Forms		<p>Complete Required Forms</p> <ul style="list-style-type: none"> <input type="checkbox"/> W-2 form <input type="checkbox"/> I-9 form <input type="checkbox"/> Verify Social Security card & driver's license as required by I-9 <input type="checkbox"/> Complete all required new-hire forms <input type="checkbox"/> Other _____ <p><i>(Note: All forms are to be kept in confidential personnel file, under lock and key. All current I-9 forms should be kept in a separate file under lock and key).</i></p>		
Notebook		Give new team member an empty notebook for training notes.		

Skill/Knowledge	Trainer	Description	Date Training Complete	Trainer's Initials
Job Description		<ul style="list-style-type: none"> <input type="checkbox"/> Present employee with Receptionist job description. <input type="checkbox"/> Review general expectations for the position, as well as protocol for annual review. <input type="checkbox"/> Present employee with a blank performance evaluation form <input type="checkbox"/> Review the hospital's management structure (i.e. hierarchy of authority) <input type="checkbox"/> Review the receptionist duties to be completed daily 		
Hospital Procedures Manual		Present employee with hospital procedures manual. Make sure the At-Will Employment acknowledgement and acknowledgement that manual has been reviewed and read forms are signed by the employee and placed in their personnel file.		
Benefits		Review benefits and effective dates.		
Phased Training Program		Present employee with a copy of the phased training program. Explain protocol (<i>trainee to sign off on each phase, trainee to ask if has questions</i>).		
Time clock & Employee Schedules		<ul style="list-style-type: none"> <input type="checkbox"/> Review Paycom. Demonstrate operation of time clock. Explain procedure for clocking in/out. <input type="checkbox"/> Discuss timelines and attendance expectations <input type="checkbox"/> Show employee the proper protocol for submitting a request for days off in Paycom and how work schedules are presented and posted. 		
OSHA Training		Conduct OSHA training. Explain OSHA standards, MSDS sheets, etc. Inform team member what they are to do if an OSHA officer shows up and ask for a tour of the practice. Make sure they know the practice OSHA safety officer's/coordinator's name. OSHA training is conducted annually		
Uniforms		Present team member with uniform policy. Review hospital dress standards.		
Observe Position		Trainee to observe (senior) receptionist.		
Telephone Procedures		<p>Show proper way to:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Answer phone, <input type="checkbox"/> Take messages <input type="checkbox"/> Place callers on hold <input type="checkbox"/> Route messages to doctors and other team members 		
Skill/Knowledge	Trainer	Description	Date Training Complete	Trainer's Initials



Basic Animal Handling		Learn basic animal handling principles. Before signing off, trainee must demonstrate proper animal handling with at least two patients.		
Time off Requests		Review calendar downstairs, time off request policy, and Homebase application.		
Billing Agreement		Explain that we avoid billing agreements Review Billing agreement requirements and forms Review CCP requirements		
Conclusion of Phase I		Review of Phase I of training program. Trainee is asked if he/she has any questions or needs further training on any part of Phase I. Trainee signs off on Phase I.		

Phase I of Training Complete

My signature below signifies that I have completed Phase I of the Receptionist Phased Training Program and that I fully understand all concepts covered and I am comfortable in my knowledge and ability to perform the procedures introduced in Phase I of this program.

Employee (Trainee)

Date

Phase II

Probable Duration: One Week

Skill/Knowledge	Trainer	Description	Date Training Complete	Trainer's Initials
Reference Materials		Present trainee with materials to review. <ul style="list-style-type: none"> <input type="checkbox"/> Present Trainee with the Common Medical Terminology Glossary. <input type="checkbox"/> Other client education materials (brochures for flea/tick HWP) <input type="checkbox"/> Review fasting requirements for BW <input type="checkbox"/> Receptionist Guidebook 		
Review Materials		Review: <ul style="list-style-type: none"> <input type="checkbox"/> Review above presented materials with trainee <input type="checkbox"/> Other _____ 		
Scheduling		Explain: <ul style="list-style-type: none"> <input type="checkbox"/> Basic appointment scheduling procedures. <input type="checkbox"/> Scheduling guidelines and special circumstances (heartworm season, etc.). <input type="checkbox"/> Fecal testing 		
Logging On/Off		Demonstrate how to log on and off the computer properly. <ul style="list-style-type: none"> <input type="checkbox"/> Review company policy regarding computer use and password maintenance/usage. 		
Software		Go over help buttons, support, and resources		



Greeting Clients		Explain the proper way clients and their pets are to be greeted and treated when they come to the practice.		
Obtain client information		Review obtaining all necessary data from clients to prepare forms i.e. new clients, consent forms, medical care plans (ie, estimates).		
Obtaining a Weight		Demonstrate how to obtain a weight on a pet (small dog vs. cat vs. lg dog)		
Wait time		Demonstrate how to handle situations where there is an extended wait		
Alert Assistant About Visit		Explain in/outpatient protocol -- the assistant/tech is to be alerted that the client and patient are ready.		
Controlling Odors		Explain procedure for controlling odors and maintaining a neat and tidy front desk. Discuss danger in using bleach and that bleach should NEVER be mixed with ammonia.		
Noise Pollution		Explain procedure for minimizing noise pollution. (e.g. barking dogs are escorted to a private area or an exam room). Explain procedure for disgruntled clients (discuss issue calmly, offer private area of office, get supervisor)		
Skill/ Knowledge	Trainer	Description	Date Training Completed	Trainer's Initials
Pulling Forms		Show how to pull forms & the filing/computer system. Before signing off, trainee must demonstrate the ability to properly handle.		
Notes		Demonstrate how to use and/or create a whiteboard note, callback, reminders.		
Messages		Review the proper way to answer the phone and take messages.		
Confirmation Calls		Explain procedure of calling clients the day before their appointments to confirm their appointment. Explain PetDesk		
Surgery Quotes		Explain the proper procedure for quoting surgery prices. Explain proper procedure for quoting exams.		
Care Companion Plans		Demonstrate how to use the Care Companion Plan Binder and the appropriate way to go over a medical care plan.		
Fax, Copier, Phone System		Demonstrate the use of necessary office equipment. Explain how to take out and pick up the mail.		
Lab box		Demonstrate how to prepare reference lab samples for pick up.		
Vaccination Due Dates		Explain how to check vaccination due dates. Before signing off, trainee must demonstrate the ability to handle this task properly.		
Conclusion of Phase II		Review of Phase II of training program. Trainee is asked if he or she has any questions or needs further training on any part of Phase II. Trainee signs off on Phase II.		

Trainee Comments - Phase II



Use this area for any comments you have concerning this phase of your training. This will help us to improve our training systems and ensure that adequate training is provided to you. Your comments will be read by the management of the practice and kept in your confidential employee file.

Phase II of Training Complete

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Employee (Trainee)

Date

Phase III

Probable Duration: One Week

Skill/Knowledge	Trainer	Description	Date Training Complete	Trainer's Initials
New Client Adding		Demonstrate how to add a new client/pet.		
Entering Charges		Demonstrate the correct procedure for entering charges into the computer. Before signing off, trainee must demonstrate the ability to correctly enter charges.		
Payments from Clients		Explain the process of accepting payment from clients <ul style="list-style-type: none"> <input type="checkbox"/> Credit cards <input type="checkbox"/> Cash <input type="checkbox"/> Check <input type="checkbox"/> Care Credit 		
Estimate		Demonstrate how to print an estimate.		
Team Meetings		Review recent team meeting minutes and the protocol for reviewing minutes if employee is unable to attend a meeting. (Posted on Bulletin Board)		
Hospital Tours		Explain protocol for client tours or when clients are allowed to visit patients in boarding or the hospital.		
Medical Reports		Demonstrate where to place medical reports and whiteboard notes.		
Contagious Soak		Demonstrate the procedures followed for a contagious soak.		
Vaccine Protocol		Demonstrate a working knowledge of vaccine protocol.		
Appointment Scheduling		Demonstrate basic appointment scheduling.		
Surgery Appointment Scheduling		Demonstrate the ability to schedule surgery appointments.		



Hospital Organization		Explain the organization of the hospital and workflow. Explain what Bulletin Board is used for.		
Surgery Forms		Demonstrate how to correctly fill out surgery forms.		
Collect laboratory specimen		Collect laboratory specimens from pet owners: <ul style="list-style-type: none"> <input type="checkbox"/> Match patient record to the sample <input type="checkbox"/> Submit the samples to veterinary technician or nurse <input type="checkbox"/> Fill out submission form <input type="checkbox"/> Present clients with medications and routine instructions 		
Skill/Knowledge	Trainer	Description	Date Training Complete	Trainer's Initials
Assign Bloodwork (Outside Lab)		Demonstrate the proper way to assign bloodwork/UA to an outside laboratory. The trainee must demonstrate the ability to handle this task properly.		
Assign Bloodwork (In-house)		Demonstrate the proper way to assign bloodwork within the practice. Before signing off, trainee must demonstrate the ability to handle this task properly.		
Outside Labs		Explain the procedure for calling outside laboratories.		
Communicate with Clients		Learn hospital guidelines for communicating with clients in different types of situations such as general queries, scheduling appointments, routine and non-routine medical questions, patient emergencies, prescription refills		
Cleaning Exam Rooms		Explain how to properly clean and disinfect an examination room.		
End of Life Appointments		Explain how end of life appointments are scheduled and how greeter should anticipate and prepare for these types of appointments. (QOL/End of life not scheduled before lunch. Schedule in a.m., after lunch, or end of day.		
Receipting Out		Demonstrate how to check-out a client <ul style="list-style-type: none"> <input type="checkbox"/> Review charts for completeness <input type="checkbox"/> Make new appointments <input type="checkbox"/> Weight updated <input type="checkbox"/> Note changes in patient status <input type="checkbox"/> Enter future reminders 		
Marketing		Discuss marketing to clients <ul style="list-style-type: none"> <input type="checkbox"/> Discuss how to promote the practices products, programs and services. (CCPs) <input type="checkbox"/> Explain the use of passive marketing <input type="checkbox"/> Ensure that employee gains a technical knowledge of products sold (reading about interceptor, bravecto, etc.) 		
Conclusion of Phase III		Review of Phase III of training program. Trainee is asked if he or she has any questions or needs further training on any part of Phase III. Trainee signs off on Phase III.		

Trainee Comments - Phase III



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Phase III of Training Complete

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Employee (Trainee)

Date



Phase IV

Probable Duration: One Week

Skill/Knowledge	Trainer	Description	Date Training Complete	Trainer's Initials
Opening		Demonstrate the procedure for opening the hospital		
Closing		Demonstrate the procedure for closing the hospital		
Surgical Charges		Demonstrate how to check surgical charges. Review the travel sheet. All services rendered should be highlighted.		
Price Quotes		Explain how and when the Trainee is to quote prices.		
Vaccination Protocol Handout		Present trainee with vaccination protocol handout and explain how to use.		
Correspondence		Demonstrate how to communicate with clients regarding medical status, medical instruction, itemize and review the client statement, inform clients about hospital policies, payment and credit policies (Billing Agreement, Drop off 50% Deposit)		
Bank Deposits		Explain how to prepare the bank deposit and complete the deposit slip.		
Credit Cards		Explain the correct procedure to follow when batching credit cards.		
End of Day		Explain the End of Day procedures. Before signing off, trainee must demonstrate the understanding of this task.		
Returning Products		Demonstrate the correct procedure to handle returns. (Diets, Retail, Medication)		
Coupons		Explain how to handle coupons.		
Bounced Checks		Explain the procedure to follow when a check bounces.		
Accounts Receivable		Explain the procedure for handling accounts receivable issues.		
After Hours ER Fee		Explain the after hour's or walk in emergency fees.		
Prescription Filing		Demonstrate how to correctly fill a prescription and the expectation that all prescriptions should be proofed. Only Technicians may fill Rx's outside of HWP, Flea/tick Prevention. Demonstrate that printing the label is the request for a refill, not an approval. The refill still needs to be approved by a doctor.		
Skill/Knowledge	Trainer	Description	Date Training Complete	Trainer's Initials



Recognizing an Emergency		Discuss referring clients for immediate treatment of their pets when the requests are accompanied by complaints of acute symptoms		
Heartworm Testing & Prevention		Explain the practice's philosophy and established protocol for heartworm testing and prevention.		
Flea Prevention 101		Explain basic flea prevention protocol.		
Client Complaints		Explain the procedure for handling client complaints.		
Displays and Retail		Explain how to restock and arrange the retail and point of purchase display areas		
Refreshment Area		Demonstrate how to restock and maintain the refreshment area		
Office Supplies		Explain the protocol for ordering inventory and office supplies		
Clean Front Area		Demonstrate how the front desk and printer should be cleaned.		
When In Doubt		Assure the employee that whenever he or she is in doubt or needs help, they are expected to seek assistance and guidance.		
Conclusion of Phase IV		Review of Phase IV of training program. Trainee is asked if he or she has any questions or needs further training on any part of Phase IV. Trainee signs off on Phase IV.		

Trainee Comments - Phase IV

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Phase IV of Training Complete

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Employee (Trainee)

Date

