

# Veterinary Technician & CVT

## Phased Training Guide

**Employee Name:** \_\_\_\_\_

**Hire Date:** \_\_\_\_\_

**Mentor:** \_\_\_\_\_

**Purpose**

The purpose of this program is to introduce the new hire to the practice and bring them into the hospital’s philosophy of care and service. Through this program, the new medical team member 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 PROFICIENT	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><b>Complete Required Forms</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> W-2 form</li> <li><input type="checkbox"/> I-9 form</li> <li><input type="checkbox"/> Verify Social Security card &amp; driver’s license as required by I-9</li> <li><input type="checkbox"/> Complete Paycom new hire checklist</li> <li><input type="checkbox"/> Other _____</li> </ul> <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>		



Skill/Knowledge	Trainer	Description	Date Training PROFICIENT	Trainer's Initials
Certification		Trainee present PM with copy of CVT credentials – if applicable		
Notebook		Give new team member an empty notebook for training notes.		
Job Description		<ul style="list-style-type: none"> <li><input type="checkbox"/> Present employee with relevant job description.</li> <li><input type="checkbox"/> Review general expectations for the position, as well as protocol for annual review.</li> <li><input type="checkbox"/> Present employee with a blank performance evaluation form</li> <li><input type="checkbox"/> Review the hospital's management structure (i.e. hierarchy of authority)</li> <li><input type="checkbox"/> Review the duties to be completed daily</li> </ul>		
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"> <li><input type="checkbox"/> Review Paycom. Demonstrate operation of time clock. Explain procedure for clocking in/out.</li> <li><input type="checkbox"/> Discuss timelines and attendance expectations</li> <li><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.</li> </ul>		
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) medical team member.		
Safety Quiz		Satisfactory completion of safety quiz.		
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 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 PROFICIENT	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. Focus areas include: Low stress handling <input type="checkbox"/> Reading pet body language <input type="checkbox"/> Handling anxious/aggressive pets <input type="checkbox"/> Safety bite avoidance		
Phones		Show proper way to: (everyone is a back up) <input type="checkbox"/> Answer phone <input type="checkbox"/> Learn basic phone operations <input type="checkbox"/> Take messages <input type="checkbox"/> Place callers on hold <input type="checkbox"/> Route messages to team members		
Pulse (eVet) Training		<a href="http://evetpracticedoc.blob.core.windows.net/videos/20170713_NewEmployeeTraining.mp4">http://evetpracticedoc.blob.core.windows.net/videos/20170713_NewEmployeeTraining.mp4</a> <a href="http://evetpracticedoc.blob.core.windows.net/videos/20170801_Invoicing.mp4">http://evetpracticedoc.blob.core.windows.net/videos/20170801_Invoicing.mp4</a> <input type="checkbox"/> Create self as client into system <input type="checkbox"/> Practice with own account to learn how to navigate <input type="checkbox"/> Can demonstrate simple navigation to trainer		
Scheduling		Trainee can demonstrate: <input type="checkbox"/> Basic appointment scheduling procedures. <input type="checkbox"/> Scheduling guidelines and special circumstances (heartworm season, etc.) <input type="checkbox"/> Schedule requirements by appointment type <input type="checkbox"/> Knows when to ask for records from previous vet		
Scanning and Linking		Demonstrate the ability to link incoming medical files or faxes and information into Evet <input type="checkbox"/> Documents-records received		
Greeting Clients		Explain the proper way clients and their pets are to be greeted and treated when they come to the practice. <b>Remember the WOW!</b>		
Customer Svc handbook		Can explain the part the technician plays in the client experience		
Wait time		Demonstrate how to handle situations where there is an extended delay		
Admissions		Demonstrates understanding of check in protocol for:		



		<input type="checkbox"/> Exams <input type="checkbox"/> Tech appointments <input type="checkbox"/> Surgical intakes		
Controlling Odors		Explain procedure for controlling odors.		
Housekeeping		Demonstrates daily cleanliness upkeep, restocking		
<b>Skill/Knowledge</b>	<b>Trainer</b>	<b>Description</b>	<b>Date Training PROFICIENT</b>	<b>Trainer's Initials</b>
Demonstrates appropriate attitude around clients		The client experience is our number one job, so a positive, supportive, kind, patient demeanor is essential to this role. Does this trainee demonstrate this sensitivity towards our clientele consistently?		
Printing tasks		Demonstrate how to create appointment sheets Demonstrate how to print vaccine records Demonstrate how to print e/c forms Demonstrate how to print admission/anesthesia forms		
Task Log		Demonstrate how to use the task log Is new hire a regular contributor to the tasks?		
Fax, Copier		Demonstrate the use of necessary office equipment. Demonstrates understanding of trouble shooting this equipment, supplies reorder process etc.		
Vaccination Due Dates		Explain how to check vaccination due dates, confirm accuracy based on records. Update properly if needed.		
Assist with Surgical Prep		Able to properly prepare surgical packs Able to thoroughly disinfect surgical suite Able to shave pet for surgery of ultrasound		
IV catheter		Able to properly administer IV catheter Able to properly set up fluid pumps Able to properly remove catheter		
Post op care		Able to adequately monitor patients post operatively and extubate		
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

My signature below signifies that I have completed Phase II of the 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 II of this program.

\_\_\_\_\_  
Employee (Trainee)

\_\_\_\_\_  
Date



**Phase III**

Probable Duration: One Week

<b>Skill/Knowledge</b>	<b>Trainer</b>	<b>Description</b>	<b>Date Training PROFICIENT</b>	<b>Trainer's Initials</b>
Surgical Team		Learn about our surgical and dentistry services. Be able to check in surgical patients, educate clients about our surgical department and advanced dentistry. Learn how to create treatment plans.		
Doctor Appointments		Shadow each of the doctors to witness their style with clients. Take note of doctor preferences. _____ _____ _____ _____		
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 <input type="checkbox"/> Credit cards <input type="checkbox"/> Cash <input type="checkbox"/> Check <input type="checkbox"/> Care Credit Trainee can demonstrate our accounts receivable expectation; and do so respectfully.		
Contagious Protocols		Demonstrate the procedures followed for a contagious pet coming into our practice.		
Vaccine Protocol		Demonstrate a working knowledge of vaccine protocol.		
Appointment Scheduling		Demonstrate all basic appointment scheduling.		
Surgery Appointment Scheduling		Demonstrates the ability to schedule surgery appointments accurately if asked to do so		
Hospital Organization		Explain the organization of the hospital and workflow.		
Collect laboratory specimen		Receive samples from reception <input type="checkbox"/> Discussion with client if necessary <input type="checkbox"/> Present clients with medications and routine instructions		
Assign Bloodwork (Outside Lab)		Demonstrate the proper way to assign bloodwork to an outside laboratory. The trainee must demonstrate the ability to handle this task properly.		
Assign Bloodwork (In-house)		Demonstrate the proper way to process bloodwork within the practice. Before signing off, trainee must demonstrate the ability to handle this task properly.		
<b>Skill/Knowledge</b>	<b>Trainer</b>	<b>Description</b>	<b>Date Training PROFICIENT</b>	<b>Trainer's Initials</b>
Inhouse labs		Demonstrates ability to analyze fecal, urine samples done inhouse		
Outside Labs		Explain the procedure for calling outside laboratories and submitting samples.		



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		
Medical Recalls		Demonstrate the procedure to follow when recalling clients. Before signing off, trainee must demonstrate the ability to handle this task properly.		
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 the technician should prepare for these types of appointments.		
Marketing		Discuss marketing to clients <ul style="list-style-type: none"> <li><input type="checkbox"/> Discuss how to promote the practices products, programs and services.</li> <li><input type="checkbox"/> Explain the use of passive marketing</li> <li><input type="checkbox"/> Ensure that employee gains a technical knowledge of products sold</li> <li><input type="checkbox"/> Able to explain our CCP plans</li> </ul>		
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

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 III of Training Complete

My signature below signifies that I have completed Phase III of the 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 III of this program.

\_\_\_\_\_  
Employee (Trainee)

\_\_\_\_\_  
Date

### Phase IV

Probable Duration: One Week

Skill/Knowledge	Trainer	Description	Date Training PROFICIENT	Trainer's Initials
Opening		Demonstrate the procedure for opening the hospital. Get ready for the day based on roles and responsibilities		
Price Quotes		Explain how and when to quote prices. Know how to prepare treatment plan		



Euthanasia		Learn our euthanasia protocols, including contacting the owner when ashes are received.		
Handling Client Complains		Learn how to handle difficult client situations.		
Treatment Tech		Learn all services provided by treatment tech <input type="checkbox"/> Nail trim <input type="checkbox"/> a/g expression <input type="checkbox"/> blood draws <input type="checkbox"/> vaccine boosters <input type="checkbox"/> suture removal <input type="checkbox"/> Lab sample processing <input type="checkbox"/> Bandage changes Sign off when successfully able to deliver services		
Handling Prescription Requests		Learn the prescription protocol and how to enter a prescription <input type="checkbox"/> Controlled <input type="checkbox"/> Non-controlled <input type="checkbox"/> Online <input type="checkbox"/> Prescription authorizations		
Controlled Substances		Demonstrate the correct procedure used when dispensing controlled substances <input type="checkbox"/> Correctly logs use EVERY TIME		
Handling Emergencies		Learn how to handle phone and in-clinic emergencies.		
CPR certification		Does trainee have a current CPR certification? Are we able to send them or will inhouse training happen?		
Phlebotomy		Able to achieve blood draws from: <input type="checkbox"/> Front leg <input type="checkbox"/> Back leg <input type="checkbox"/> jugular		
Anesthesia training		Logging anesthesia records during procedures		
Anesthesia Monitoring		Key standards for safe anesthesia. Does trainee demonstrate comfort with standards of care while animals are under anesthesia? <input type="checkbox"/> Heartrate <input type="checkbox"/> Blood pressure <input type="checkbox"/> Knows when to alert doctor		
Recognizing an Emergency		Phone Triage: can explain how to triage calls to direct for appropriate care		
<b>Skill/Knowledge</b>	<b>Trainer</b>	<b>Description</b>	<b>Date Training PROFICIENT</b>	<b>Trainer's Initials</b>
After Hours ER Fee		Explain the after hour's emergency fees.		
Crash Cart		Is trainee familiar with the crash cart; knows locations of items that may be needed by doctor		
Radiology		Able to achieve satisfactory images utilizing the equipment properly		
Radiology Safety		Completed radiology safety training		
General Safety		Successfully completed standard safety quiz		
Heartworm Testing & Prevention		Explain the practice's philosophy and established protocol for heartworm testing and prevention.		
Flea Prevention 101		Explain basic flea prevention protocol.		
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. QUESTIONS		
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.		
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**Trainee Comments - Phase IV**

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.

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**Phase IV of Training Complete**

My signature below signifies that I have completed Phase IV of the 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 IV of this program.

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Employee (Trainee)

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Date

