**Practice Manager Phased Training Guide**

**Employee Name: Hire Date:**

**Purpose**

The purpose of this program is to introduce the Practice Manager to the practice and bring them into the hospital’s philosophy of care and service. Through this program, the new Practice Manager 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.

This in hospital training will be combined with WellHaven departmental training sessions and weekly meetings with your medical operations support team. Please review the link provided and contact your medical operations manager with the day / time you have selected for each department training session. [Monthly Trainings CURRENT.docx](https://1drv.ms/w/c/4e5cf545285f263a/EVu0BegaMUNNvDaT2qNkoxgBFhSEnRen2Kdc5y7lJAqKuA?e=VGStZX)

**Phase I - Welcome to Our Practice!**

**IN HOSPITAL: PD (Any area notating "staff" as trainer, will reference a team member designated by the PD)**

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| **Hospital Orientation** | **PD / Staff Leader** | **Description** | **Date Training Complete** | **Trainer’s Initials** |
| Parking | PD / Staff | Show employee parking area. |  |  |
| Personal Storage | PD | Provide employees with personal storage space. Discuss protection of personal property at work |  |  |
| Hospital Orientation & Tour | PD / Staff | Orientation - 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.  Discuss hospital workflow |  |  |
| Introduc­tions / Q & A: provide PM bio in advance | PD | Introduce employee to doctors and other healthcare team members.  Identify hospital leads; provide opportunity for staff to meet with new PM |  |  |
| Workspace | PD | Identify office space / computer / personal storage: location of staff files - facility information - equipment information |  |  |
| Notebook | PD | Provide new team member with an empty notebook for training / orientation notes. |  |  |
| Hospital Access | PD | Provide keys / codes: review protocol for arrival / end of day: after-hours access protocol: Review emergency protocol for after hour alarm |  |  |
| Hospital Schedule | PD | Review Schedule: hospital / DVM schedule (hours of operation, appointments, drop-offs, staff breaks, support staff per DVM, etc). Schedule 1:1 meeting weekly (PD/PM) |  |  |
| **ADMINISTRATION** |  |  | **Date Training Complete** | **Trainer’s Initials** |
| Paycom | PD / Operations Manager | Enter employee in Paycom: Verify receipt / completion of personal onboarding / Verbal (need to sign in Paycom also) acknowledgement of WellHaven Handbook: Verify PM access |  |  |
| Email Access | PD / submit IT ticket | Request PM email: verify access has been provided, set up complete. This can be started before the first day. Make sure to add to the PM distribution list (PM email work needs to be in Paycom) |  |  |
| Reporting | Operations / Cameron | Verify access to PM reporting (Knowledge Base) |  |  |
| Pulse | PD | Enter employee in Pulse: grant necessary access (Business Owner) and log in: Review training guide and training tutorial: verify PM has admin access: explain different access for different roles within hospital   * New staff should access and complete all available tutorials (lower right)   Review log on / off  Review Pulse governance:  \* Only PD/PM can make changes In Pulse  \* NO ADJUSTMENTS to price, cost, mark-up, code name, code number, service fee are to be done |  |  |
| Pulse Training | Front Desk | Schedule observation / shadowing day(s):   * Scheduling appt (sx, drop off, room, Vetstoria, pet desk) * Estimates * Invoicing * Adding new client / new pet * Training guides online, use training site * Familiarize with consent forms, discharge forms standardized code use (Dr. Luebbers partners if needed), charging guide if needed * Scheduling appts to maximize access to patient care (minimal use of blocks, hours of operation are 8-6, appt start at 8 and last is at 530) * IDEXX integration for lab results, In house lab results * Emailing from pulse * CCP vs non-CCP * Enrollment of CCP * Client communication and Collections process |  |  |
| Required Forms | PD | **Complete Required Forms (In paycom)**   * W-2 form * I-9 form * Verify Social Security card & driver’s license as required by I-9 * Complete all required new-hire forms * Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   *Note:* Complete Section 2 of I-9 and Activation PAF in Paycom.  Performance documentation should be kept in employee personal file, on site, in secured location. |  |  |
| Job Description | PD / Medical Operations Manager | * Provide Practice Manager job description found in Knowledge Base & Paycom: link provided in Practice manager Guide * Provide Practice Manager Guide * Review general expectations for the position, as well as protocol for annual review. * Present employee with a blank performance evaluation form * Review the hospital’s management structure (i.e. hierarchy of authority) * Review roles / responsibilities of support staff * Review delegation of duties between PD and PM |  |  |
| Hospital Procedures Manual | PD | 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. OSHA, Radiation Training, DEA training/process: covered below |  |  |
| Benefits | PD / HR | Review benefits and effective dates. Knowledgebase - 2024 Benefits Guide.   * Explain benefits * Start date * Pay period * PTO |  |  |
| Phased Training Program | PD | Present employee with a copy of in progress PM phased training program. Explain protocol *(trainee to sign off on each phase, trainee to ask if has questions)*.  Accessible in Knowledgebase |  |  |
| Time clock & Employee Schedules | PD | * Review Paycom. Demonstrate operation of time clock. Explain procedure for clocking in/out. * PM (salaried employee) required to clock In and out * Discuss timelines and attendance expectations * Show employee the proper protocol for submitting a request for days off in Paycom and how work schedules are presented and posted. * What is current process for time of requests? * Approving timecards when due * Labor calculator? * Paycom scheduler? Best practices to schedule team (will attend scheduler training) |  |  |
| Uniforms | PD | Present team member with uniform policy. Review hospital dress standards: order New Employee Welcome Package and scrubs: After 30 days – order business cards |  |  |
| AAHA | PD | Provide access to AAHA Guidelines / Review Hospital status: Upcoming certification / re-certification date |  |  |
| Observation | PD / Staff / Lead | Schedule observation for ALL roles/ areas of hospital: CSR / VA / Technician: PM to spend time in all locations of hospital (recommend minimum of 1 day per location with lead / highly skilled employee) |  |  |
| Telephone Procedures | PD / Lead | Show proper way to:   * Answer phone: Name of Hospital / Greeting * Take messages * Place callers on hold * Route messages to doctors and other team members |  |  |
| Resource Review / Provided PM Binder | PD / Medical Operations Manager | Knowledgebase   * Review Resources Available * Verify PM Access * Highlight areas of need:   + PAF forms   + Important contacts section   + Training tools (delegated duties, CSR, training)   + Reporting   + HR (e.g. Benefits)   + OSHA workplace injury information   + How to enter a new employee into Paycom   + Relief DVM documents   + Mentor guides   + Org chart (has emails also)   + All Hospital Calls/Webinars * Links will be provided In Practice Managers Guide) |  |  |
| Pulse Reporting | PD / Department Training (Finance) | Review:   * End of day reporting: process: utilization * Weekly reporting: process: utilization * Monthly reporting: process: utilization * Good Week Report: utilization / KPI review * Production detail reports DVM * Hospital Bonus * P&L |  |  |
| Deposits | PD / Lead | Review:   * End of day SOP * Deposit SOP * Deposit slips / deposit bags / frequency * Safe location / access * Directions / address of bank |  |  |
| Controlled Substance Management | PD | * Access Controlled Drugs Box * Access to secure location for keys/code * Drug Log / VetSnap / Cubex * DEA / license information * DEA SOP * DEA files/DEA holder: 222 forms (unused and used), licenses, any Form 41, 106, invoices etc. * Review SOP for controlled substances * Reverse distributor for destruction |  |  |

**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**

**Additional Training / Support from Departmental Meetings and Medical Operations: Vetcove - COG Management / VFC / Wellness Plans / Scheduler /Marketing / Payroll /Accounts Payable / TA – recruiting / Finance /HR**

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| --- | --- | --- | --- | --- |
| **Training / Responsibilities** | **Trainer** | **Description** | **Date Training Complete** | **Trainer’s Initials** |
| Monthly Department Training | Operations Manager | Provide contact list: provide meeting links (minimum 1 meeting w/ each department) HR will contact employee to schedule directly |  |  |
| Weekly Training / Support | Operations Manager | Weekly Meeting Cadence w/ Operations: via Teams |  |  |
| Hospital Budget | PD / Med Operations | Review Good Week Report: Review 2024 Budget   * KPI review / management * PM direct management: COG / Labor * Production detail reports * Budget worksheets |  |  |
| Wellness Plans / CCPs | PD / Emily | Hospital does not provide in house financing  Review CCP ‘s   * Staff Wellness Plans: Review timeline for eligibility * Client Wellness Plans: set up / management * Charging / Pulse * Training of PM for CCP * How to enroll, failed payments, reports to use to track (e.g. open invoice report) * Collections process |  |  |
| Care Credit | PD /CSR Lead | If applicable to your location:   * Review Care Credit * Review client information (e.g brochure; website; application process) * Review processing of Care Credit Payment through portal * Review processing of Care Credit payment In Pulse |  |  |
| Vetcove | PD / Med operations / Stephen | Provide Log In Information: Review System  Review hospital schedule for ordering: How to place order  VetCove Continued:   * Process for identifying needed pharmaceuticals * Review Weekly budget / provided In Vetcove * Preferred vendors / Elanco and Covetrus * COG management / expectations   + monthly hospital budget goals * WH Logo - preferred vendor * Use Covetrus ($10 variance / other vendor) * Frequency: order once weekly / Monday * Review shipping / delivery time frames * Review "drop ship Items" frequently ordered (e.g.   + Microchips) |  |  |
| Outside Purchases | PD / Med Operations | Review Purchasing of whitegoods / non-VetCove Vendors  Credit Card utilization |  |  |
| VFC (Covetrus VRxPro) | PD / Medical Operations | Review online pharmacy and philosophy of use; Review client communication / education; Provide Log In Information;   * Review steps for processing client prescription requests * Review request RX for client (Pulse - blue button) * Process for external online pharmacies (e.g. Chewy, 1-800-Pet-Meds) * Food (rx and OTC hills, Purina and RC) retail, chronic medications, non-preferred vendors on VFC (vRxPro) * Discuss revenue stream & profit margin from online pharmacy and reduction in COGs. Impact on HL bonus. * Review best practice:   non-ccp client: send home only 1 dose of HW/FT, online pharmacy for remainder of year:  Chronic medications - 30 day dosage dispensed, set up auto ship thereafter. |  |  |
| Scheduler | PD / Tami | Review staff / DVM schedule in Pulse and Paycom Scheduler  \* Review process for requested PTO  \* Review current hospital protocols for "Call  Outs"  \* Utilization of Pulse Scheduler – all schedules should be completed 3 months in advance for DVM; para staff 4 weeks out minimum  \* Review current process for scheduling staff  Review process for when DVM calls in sick (e.g. reduce staff based on DVMD)  \* PD: review DVM contracted days (expectations for hours In hospital / seeing pets)    \*attend monthly training (Scheduler / Tami) |  |  |
| Marketing | PD / Brandon | Provide access / log in for Facebook, Instagram: Review hospital process for posting (frequency / current responsible party):  Website: review process for requesting updates / changes / promotional postings  \* Ordering business cards / hospital brochures  \*attend monthly training |  |  |
| TA / Recruiting | PD / Ryan, Misty & Elena | Review staff hiring process : ATS system / Clear Company   * Review hospital staffing numbers /needs * DVM hiring process (Ryan) * Review resources for relief coverage (Misty) * Students: DVM / Techs / VA’s (Elena)   \*attend monthly training |  |  |
| Finance | PD / Cameron | Attend monthly training |  |  |
| Payroll | PD / Daniel | Review Paycom   * Adding Employee * PAR / PAF Forms * Payroll approval \*attend monthly training |  |  |
| **PM / Hospital Training** | **Trainer** | **Description** | **Date Training Complete** | **Trainer’s Initials** |
| Accounts Payable | PD / Debbie | Review all vendor accounts (Vetcove / outside Vetcove): provide access to accounts / log in information:  \* all outside vendors (e.g. lawn care; handyman) should Invoice accountspayable@wellhaven.com directly  \* cc use / minimal (e.g. white goods; staff lunch, etc)  \*attend monthly training |  |  |
| HR | PD / Bailey | Review PM responsibilities - staff management  \*attend monthly training |  |  |
| Cost of Goods | PD / Med Operations | Review COG management: expectations for budget/ weekly ordering :  \* Utilization of online pharmacy / reduce Inventory  \* Preferred vendors (financial benefit)  \* Impact of outside services / pricing (e.g. ultrasound ; surgeon; echos, etc.)  \*attend monthly training |  |  |
| Facility management | PD / Jessica | Review facility management company - provide contact information: review process for reporting facility issues: review process for requesting equipment purchases / repairs  Review process for equipment replacement / repair  \*Contact Jessica as needed |  |  |
| IT | Jorge / Michael | Review process for submitting ticket / request for assistance: [itsupport@wellhaven.com](mailto:itsupport@wellhaven.com)  Phones, computers, printers |  |  |

**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 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 II of this program.

Employee (Trainee) Date

**Phase III**

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| **Skill/Knowledge** | **Trainer** | **Description** | **Date Training Complete** | **Trainer’s Initials** |
| Office Equipment | PD / Lead | Designated team member:  Review utilization of office equipment (phones / fax / printer / scanner / tablets / cc terminals)  Provide access to User Guide / warranty information  Direct contact for IT support (ex: WorldPay) |  |  |
| HR Training / Management | PD / Medical Operations | Provide / Review:   * Review Current Hospital training guide(s) (CSR,VA,Tech) * WellHaven Annual Compensation Evaluation Process |  |  |
| Team Meetings | PD | Review current meeting structure: attendance expectations   * Department (CSR / Techs / VA) * DVM meetings * All staff meeting * Expectations for PM management of meetings |  |  |
| OSHA Training | PD / Lead | Review OSHA training protocol: Covetrus representative contact to schedule annual training: Provide all affiliate manuals / binders .  \* Identify license(s) / posting location in hospital  \* Review OSHA injury process / posting location in hospital  \* Hazardous waste disposal process: company contact  \* Controlled substance disposal process (e.g. formalin; unused Injectables; dip tank, etc) |  |  |
| Security / Contact List | PD | Add PM to notification list |  |  |
| In House Lab Equipment | PD / Lead | * Proper use * Contract agreement / expectations * Cleaning schedule / protocol * Outline tech support / contact information * Training Manual |  |  |
| Radiology | PD / Lead or RSO if present | * Review Radiation Training Manual, location, annual training required * Connect with Jessica on Radiation Registration License: expiration date : contact Information for renewal * Shielding Plan (If required): posted * Provide Manual / Quality Assurance Program / Annual Team Training Review: **PM needs to read thoroughly and sign off** * Review protective equipment / location * Review PPE evaluation manual (required every 6 months) * Review Dental, full body Logs, rejection logs, retake logs, etc. * Review process / responsible Safety Officer – provide access to binder * Provide access to radiation reporting * Order dosimetry badge (if required) : Identify where to order (Covetrus) * Access Radiology Dosimetry Badge reporting |  |  |
| Anesthesia Equipment | PD / Lead | Provide:   * Machine / vaporizer service schedule (annual) log * Equipment replacement log * Daily maintenance log * Training Manual * Provide Contact information for service provider |  |  |
| Hospital Best Practice / SOC | PD | * Vaccine Protocols * Diagnostics (annual lab work / urinalysis) * Medication monitoring * Dental / Full mouth radiographs * Examination * AAHA Standards |  |  |
| Reference Lab | PD / Lead | * Provide account information * Review submission process * Review process for receiving results / client communication |  |  |
| Specialist | PD / Lead | * Who: radiology / surgery / ultrasound / echo / anesthesia / dentistry * Process for referral / submission: in hospital scheduling * Process for receiving results / client communication * Accounts / Invoice submission |  |  |
| AR (Accounts Receivable) | PD | * Review hospital policy – payment due at time of service * Review client communication / documentation (excel sheet) * Submission for collections * Contact / account information / collection company |  |  |
| Staff Training | PD | Provide staff training protocols / check off sheets: review process for onboarding ; training in each department / role |  |  |
| Prescription Requests / Refills | PD | Review hospital protocol: in house / VFC  Demonstrate how to produce / print label |  |  |
| Coupons / Promotions | PD | Review how to appropriately enter into Pulse: review current promos for hospital |  |  |
| Client Lobby | PD | * Review cleaning schedule * Brochures / business cards * Client refreshments |  |  |
| Janitorial Services | PD | Review:   * Cleaning service schedule; contact information * Staff responsibilities: check off sheet |  |  |
| ER Services | PD | * Outline hospital SOP * Referring locations for after-hours ER * Process for requesting business cards / brochures * Phone messaging * Social media messaging |  |  |

**Trainee Comments - Phase III**

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**Phase III of Training Complete**

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

Employee (Trainee) Date