

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-61025.pdf](https://www.wellhavenpet.com/monthly-trainings-61025.pdf)

Phase I - Welcome to Our Practice!

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

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	<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. 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 & sign off 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	<p>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</p> <ul style="list-style-type: none"> New staff should access and complete all available tutorials (lower right) <p>Review log on / off</p> <p>Review Pulse governance:</p> <ul style="list-style-type: none"> * 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 *Review and show where new standard code ticket is *review where Reporting information is found, including Hospital Resources Section 		
Pulse Training	Front Desk	<p>Schedule observation / shadowing day(s):</p> <ul style="list-style-type: none"> 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	<p><u>Complete Required Forms (In paycom)</u></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 _____ <i>Note: Complete Section 2 of I-9 and Activation PAF in Paycom.</i> Performance documentation should be kept in employee personal file, on site, in secured location.		
Job Description	PD / Medical Operations Manager	<input type="checkbox"/> Provide Practice Manager job description found in Knowledge Base & Paycom: link provided in Practice manager Guide <input type="checkbox"/> Provide Practice Manager Guide <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 roles / responsibilities of support staff <input type="checkbox"/> 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 – up to date Benefits Guide. <ul style="list-style-type: none"> • Explain benefits • Start date • Pay periods • PTO 		
Phased Training Program	PD	Present employee with a copy of in progress PM phased training program. Explain protocol (<i>trainee to sign off on each phase, trainee to ask if has questions</i>). Accessible in Knowledgebase		
Time clock & Employee Schedules	PD	<input type="checkbox"/> Review Paycom. Demonstrate operation of time clock. Explain procedure for clocking in/out. <input type="checkbox"/> PM (salaried & non-salaried employee) required to clock In and 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. <input type="checkbox"/> What is current process for time of requests? <input type="checkbox"/> Approving timecards when due <input type="checkbox"/> Review parahours/DVMD target <input type="checkbox"/> SLING: 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: <ul style="list-style-type: none"> <input type="checkbox"/> Answer phone: Name of Hospital / Greeting <input type="checkbox"/> Take messages <input type="checkbox"/> Place callers on hold <input type="checkbox"/> Route messages to doctors and other team members 		
Resource Review / Provided PM Binder	PD / Medical Operations Manager	<p>Knowledgebase</p> <ul style="list-style-type: none"> • Review Resources Available • Verify PM Access • Highlight areas of need: <ul style="list-style-type: none"> ○ 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 (see knowledge base) ○ 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)	<p>Review:</p> <ul style="list-style-type: none"> • 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	<p>Review:</p> <ul style="list-style-type: none"> • End of day SOP • Deposit SOP • Deposit slips / deposit bags / frequency 		



		<ul style="list-style-type: none"> • Safe location / access • Directions / address of bank 		
Controlled Substance Management	PD	<ul style="list-style-type: none"> • 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

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 <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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 / Dr. Luebbers	Provide Log In Information: Review System Review hospital schedule for ordering: How to place order Vetcove Continued: <ul style="list-style-type: none"> * Process for identifying needed pharmaceuticals * Review Weekly budget / provided In Vetcove * Preferred vendors / Elanco and Covetrus * COG management / expectations <ul style="list-style-type: none"> 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. <ul style="list-style-type: none"> Microchips) 		



Outside Purchases	PD / Med Operations	Review Purchasing of whitegoods / non-VetCove Vendors Credit Card utilization		
VFC (Covetrus VRxPro)	PD / Medical Operations	<p>Review online pharmacy and philosophy of use; Review client communication / education; Provide Log In Information;</p> <ul style="list-style-type: none"> 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 – 14-day dosage dispensed, set up auto ship thereafter. 		
Scheduler	PD / MedOps Manager	<p>Review staff / DVM schedule in Pulse and Sling</p> <ul style="list-style-type: none"> * 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 <p>Review process for when DVM calls in sick (e.g. reduce staff based on DVMD)</p> <ul style="list-style-type: none"> * PD: review DVM contracted days (expectations for hours in hospital / seeing pets) <p>*attend monthly training (Sling/ Tami)</p>		
Marketing	PD /HR	<p>Provide access / log in for Facebook, Instagram: Review hospital process for posting (frequency / current responsible party):</p> <p>Website: review process for requesting updates / changes / promotional postings</p> <ul style="list-style-type: none"> * Ordering business cards / hospital brochures *attend monthly training 		
TA / Recruiting	PD / Jen K.	<p>Review staff hiring process : ATS system / Clear Company</p> <ul style="list-style-type: none"> Review hospital staffing numbers /needs DVM hiring process (Ryan) Review resources for relief coverage (Misty) Students: DVM / Techs / VA's (Elena) <p>*attend monthly training</p>		



Finance	PD / Cameron	Attend monthly training		
Payroll	PD / Daniel	Review Paycom <ul style="list-style-type: none"> • 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	Review process for submitting ticket / request for assistance: 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

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: <ul style="list-style-type: none"> Review Current Hospital training guide(s) (CSR,VA,Tech) WellHaven Annual Compensation Evaluation Process 		
Team Meetings	PD	Review current meeting structure: attendance expectations <ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Proper use Contract agreement / expectations Cleaning schedule / protocol Outline tech support / contact information Training Manual 		
Radiology	PD / Lead or RSO if present	<ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> Machine / vaporizer service schedule (annual) log Equipment replacement log 		



		<ul style="list-style-type: none"> Daily maintenance log Training Manual Provide Contact information for service provider 		
Hospital Best Practice / SOC	PD	<ul style="list-style-type: none"> Vaccine Protocols Diagnostics (annual lab work / urinalysis) Medication monitoring Dental / Full mouth radiographs Examination AAHA Standards 		
Reference Lab	PD / Lead	<ul style="list-style-type: none"> Provide account information Review submission process Review process for receiving results / client communication 		
Specialist	PD / Lead	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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 / vRxPro Demonstrate how to produce / print label		
Client Lobby	PD	<ul style="list-style-type: none"> Review cleaning schedule Brochures / business cards 		
Janitorial Services	PD	Review: <ul style="list-style-type: none"> Cleaning service schedule; contact information Staff responsibilities: check off sheet 		
ER Services	PD	<ul style="list-style-type: none"> 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

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Employee (Trainee)

Date

