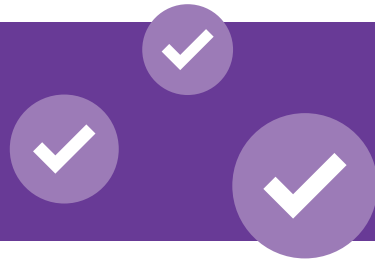


Date: _____

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

New Patient Sign Up

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