WEEK ONE

Consisting of learning the general operations of the clinic, focusing primarily on intake & Clinic HQ (CHQ) software training.

Day 1:

❑ Review resources on ASPCApro.org:
  o Intake how-to: https://www.aspcapro.org/resource/spayneuter-clinic-intake
  o Kennel cards: https://www.aspcapro.org/resource/spayneuter-clinic-kennel-cards

❑ Observe intake of patients, focusing on the two counter roles & the greeter role
❑ Review CHQ Help Center videos (in *E-Learning* section)
❑ Enter paperwork in CHQ
❑ Check out patients in CHQ

Day 2:

❑ Review resources on ASPCApro.org:
  o Patient Release: *https://www.aspcapro.org/resource/spayneuter-clinic-patient-release*
  o Post-op Instructions: https://www.aspcapro.org/resource/post-op-instructions-spayneuter-clinics

❑ Observe release of patients, focusing on the two counter roles & the greeter role
❑ Review CHQ Help Center videos (in *Checkout* section)
❑ Enter paperwork in CHQ
❑ Check out patients in CHQ

Days 3 & 4:

❑ Review resources on ASPCApro.org:
   o *Intake Forms:* *https://www.aspcapro.org/resource/spayneuter-clinic-supplementary-intake-forms*
   o *Paperwork Flow:* https://www.aspcapro.org/resource/spayneuter-clinic-paperwork-flow

❑ Participate in admission & release of patients, working the admin counter role & the greeter role
❑ Review CHQ Help Center videos (in *Accounting, Reports, & Settings* sections)
❑ Enter paperwork in CHQ & make changes from change sheet
❑ Check out patients in CHQ

Day 5:

❑ Participate in admission & release of patients
❑ Focus on CHQ, including how to enter partners & grants, patient detail changes, managing appointment calendar, & pricing structures

WEEK TWO: continuing training in intake & CHQ.

Days 1, 2, & 3:

❑ Participate in intake & release of patients, working the admin counter role & the greeter role
❑ Run reconciliation report in CHQ & balance cash drawer
❑ Enter paperwork in CHQ & make changes from change sheet
❑ Check out patients in CHQ
❑ Assist in recheck scheduling & paperwork

Day 4:

❑ Participate in intake & release of patients
❑ Review *Handling - Trapped Cats* how-to video: https://youtu.be/iKq2BVC2T4E
❑ Focus on community cats, including trap loan program, cat shelters, & special check-in & release procedures

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Day 5:

❑ Participate in intake & release of patients
❑ Focus on CHQ, including microchips, online booking, & reporting

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WEEK THREE: continuing intake & CHQ work, & training on phones & appointment scheduling.

Day 1:

❑ Review resources on ASPCApro.org:
  o *Scheduling Appointments*: https://www.aspcapro.org/resource/scheduling-spayneuter-appointments
❑ Review CHQ Help Center videos (in *Appointments* section)
❑ Participate with intake & release of patients, working the admin counter role & the greeter role
❑ Learn phone system, inc. placing holds, managing lines & parked calls, paging, & other features
❑ Review procedures regarding rechecks & medical calls
❑ Answer phones & schedule appointments

Days 2, 3, 4, & 5:

❑ Participate in intake & release of patients, working the admin counter role & the greeter role
❑ Run reconciliation report in CHQ & balance cash drawer
❑ Enter paperwork in CHQ & make changes from change sheet
❑ Check out patients in CHQ
❑ Answer phones & schedule appointments

WEEK FOUR

Week four consists of learning the basics of medical flow and transport. At the end of this week, the trainee should be ready to take the office assistant exam:

Day 1:

❑ Review resources on ASPCApro.org:

　　o *Kennel Cleaning & Disease Prevention:* https://www.aspcapro.org/resource/spayneuter-clinic-kennel-cleaning-disease-prevention

❑ Participate in kennel cleaning & laundry

Day 2:

❑ Review resources on ASPCApro.org:

　　o *Packs Preparation*: https://www.aspcapro.org/resource/spayneuter-packs-preparation

❑ Participate in pack preparation & pack laundry

Day 3:

❑ Review resources on ASPCApro.org:

　　o *Medical Flow*: https://www.aspcapro.org/resource/spayneuter-clinic-medical-flow

❑ Shadow veterinary assistant throughout check-in, prep, surgery, & recovery

Day 4:

❑ Review resources on ASPCApro.org:

　　o *Running Transport*: https://www.aspcapro.org/resource/running-spayneuter-transport-program

❑ Ride along with *transport assistant* to collect patients
❑ Assist in unloading vehicle
❑ Assist in cleaning vehicle

Day 5:

❑ Assist in loading vehicle
❑ Ride along with *transport assistant* to return patients
❑ Assist in cleaning vehicle
❑ Learn about our transport partners – how we schedule, communication, & general procedures

WEEK FIVE (as scheduling allows)

Week five introduces our training programs & allows the trainee to shadow administrative training for one of our NSNRT clinics. It also allows time for a more comprehensive look at the information & resources available on our website. This week should be scheduled during the first available NSNRT training week.

<u>Day 1, 2, 3, & 4:</u>

❑ Review website:
   o *Spay/Neuter Clinic Mentorship* page:
      https://www.aspcapro.org/training-site-training/spayneuter-clinic-mentorships

❑ Shadow *office manager/office assistant's* training – all classes & modules

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<u>Day 5:</u>

❑ Review website pages:
   o *Clinic Services (on ASPCA.org):* http://aspca.org/asheville
   o *Veterinary Student Externship:* https://www.aspcapro.org/training-site-training/veterinary-student-externship
   o *Veterinarian Training:*   https://www.aspcapro.org/training-site-training/veterinarian-training
   o *S/N Surgical Team Training:*   https://www.aspcapro.org/training-site-training/spayneuter-surgical-team-training
   o *Clinic Consultations:*   https://www.aspcapro.org/training-site-training/clinic-consultations
   o Vet Assistant Course: https://www.aspcapro.org/training-site-training/veterinary-assistant-course

❑ Meet with *training program manager* for overview of *Veterinary Student Externship*
❑ Meet with *training program manager* for overview of *Veterinarian Training* program

A quiz that tests employees on the content of this checklist can also be found at:

https://www.aspcapro.org/resource/training-materials-sn-clinic-staff