**MODULE 11: BUSINESS AND COMMUNICATION**

**Lesson 1: Prices and Policies for Payment**

1) What forms of payment does our practice accept?

**Answer:**

 2) Does our hospital offer any discounts?

[Note to Trainer: For multiple pets? Senior citizens? Promotions during February for National Pet Dental Health Month? What are the pros and cons of discounting?]

**Answer:**

3) Under what circumstances (if any) is a client required to provide a down payment?

**Answer:**

4) What are the client’s options if they cannot afford to pay a bill in full?

[Note to Trainer: Do you hold checks or credit cards? Do you use CareCredit® (or a similar program)? Can they leave money on their account? What does the CCR say to clients who request credit when the client phones to book an appointment?]

**Answer:**

5) Which clients, if any, are permitted to leave fees on their account?

**Answer:**

6) How do we avoid having clients leave without paying the bill?

*Sample Response: When scheduling first time clients say, “Payment is due at the time of service and we accept cash, checks, Visa, MasterCard, and CareCredit®.” Make sure estimates are provided and the client knows how much the appointment/service will cost. Let the client know at the end of the appointment that you will have their charges ready in a few minutes.*

7) When are overdue account statements mailed to clients?

**Answer:**

8) Approximately how much money is currently in our practice’s accounts receivable?

**Answer:**

9) How does this affect the profitability of our practice?

**Answer:**

10) How does our practice compare with the national average?

[Note to Trainer: For help with this question, visit the National Commission on Veterinary Economic Issues’ website.]

**Answer:**

11) Who is the accounts receivable manager? What does this job entail?

**Answer:**

12) How does our practice minimize the accounts receivable?

*Sample Response: Inform clients that payment is due at the time of service and enforce it. Give accurate estimates and discuss payment options ahead of time.*

13) Is the payment policy different for first time clients?

**Answer:**

14) Is the payment policy different for euthanasia cases?

*Sample Response:* *These are some exceptions to our rules. We do not want to ask upset or crying clients to stop and pay at the front desk after euthanizing their pet. Since it is not always known ahead of time that a euthanasia will be performed or what type of cremation the owners will want, prepaying is not always an option.*

15) What personal information do we require from new clients?

*Sample Response: We require either a social security number or driver’s license number. A business is within their rights to request these, but it is the individual’s right to refuse to provide it. If they will not provide their social security number or driver’s license number, the CCR can make a note in the file that that particular client cannot pay by check.*

16) What is our hospital’s policy if a client sends their teenage child in with the pet but does not provide a way for the child to pay the bill?

**Answer:**

17) Can minors sign consent forms?

**Answer: No. It is important to know who is signing the paperwork. If Mom sends the teenager in to admit their pet for a procedure and the teenager signs the forms, this may not be considered a legal authorization.**

18) What is our hospital’s policy for returned checks (i.e., insufficient funds)?

**Answer:**

19) What are “missed charges” and why are these important?

**Answer:**

20) If a client pays their bill and leaves and you realize later that some charges were missed, what do you do?

**Answer:**

21) Does our hospital offer bundled or packaged services such as puppy packages?

**Answer:**

22) When are clients provided with an estimate?

[Note to Trainer: Does the CCR provide an estimate for every visit at the time of booking? Are all clients quoted the price for every surgery that is booked? Every major illness? If it is an established client who is well aware of your fees, do you still provide an estimate?]

**Answer:**

23) How is an estimate turned into an invoice in the computer?

**Answer:**

24) What is a dispensing fee/prescription fee? What is this for?

**Answer:**

25) What is a minimum fee? What is this for?

**Answer:**

26) What is an office fee for and when is it used?

**Answer:**

27) Does our practice offer after hours emergency services? If so, are the charges for this service different?

**Answer:**

28) What is included in the price of a spay or neuter?

[Note to Trainer: Phone shopping skills are covered in Module 10, Lesson 1. The goal of this question is to make sure new team members have a realistic idea of what things cost and why.]

*Sample Response: The spay/neuter fee includes a preanesthetic exam, anesthesia, a sterile surgery pack, a sterile preparation of the surgery site, the doctor’s and technician’s time to perform the anesthesia, preparation, surgery, and recovery, hospitalization, administration of intravenous fluids, administration of pain medication, and personnel’s time to admit and discharge the patient.*

29) What additional services are commonly performed at the time of a routine spay/neuter? How much do these cost?

[Note to Trainer: Does your practice charge extra for preanesthetic blood testing, IV fluids or ECG screening or are these included in the spay/neuter fee (for example).This is a good opportunity to review some typical surgery estimates. New trainees are often very surprised to learn that can take longer to remove a couple of big dewclaws than it does to do the spay/neuter, which is why the dewclaw removal adds a substantial amount to the bill.]

*Sample Response: For example, some clients request to have a microchip inserted, a nail trim, or dewclaw removal at the time of a spay/neuter.*

30) What other services would a veterinarian typical provide at the time of a routine annual visit in addition to the basic vaccine charges?

**Answer:**

31) What is a blood collection fee?

**Answer:**

32) When is a blood collection fee charged? When is it not charged?

**Answer:**

33) Does the heartworm test charge include an office visit or a blood collection fee or are these extra?

**Answer:**

34) Does the blood collection fee include an office visit?

**Answer:**

35) Does our practice honor exam certificates from humane societies?

**Answer:**

**MODULE 11: BUSINESS AND COMMUNICATION**

**Lesson 2: Practice Management**

[Note to Trainer: This lesson requires some information regarding your practice’s finances. For assistance with this section, visit the National Commission on Veterinary Economic Issue’s website.]

1) What is the job of the leader? The manager?

*Sample Response: The leader decides which forest you are going to cut down. The manager doles out the axes, makes sure the tools get sharpened and keeps everyone on task. Leadership is about goals and vision, management is about people and processes.*

2) What is “Open Book Management”?

**Answer: Open Book Management is about giving team members enough information about the business that they can make, or participate in making, good decisions about the parts of the practice that affect them and that they have control over.**

3) Does our practice use Open Book Management? What financial information is accessible to team members?

**Answer:**

4) What is gross revenue?

**Answer: The total amount of money that comes into the practice.**

5) What is net revenue?

**Answer: The amount of money remaining after all the employees and bills are paid.**

6) What are the two ways to increase net income?

**Answer: Increase income or decrease expenses.**

7) Give some examples of what a practice can do to increase income or decrease expenses.

[Note to Trainer: The point of this lesson is that, in general, it is easier and more effective to increase income than it is to decrease expenses.]

*Sample Response: To increase income, a practice can sell more senior wellness panels, sell more bags of dog food, minimize missed charges, service more new clients, and retain more clients. To decrease expenses, a practice can stock less pet food, decrease the number of team members, turn off the lights to conserve energy, etc.*

8) How can gross production be increased?

**Answer: Increase the number of transactions or the amount of each transaction.**

9) Give some specific examples of how gross production can be increased.

*Sample Response: To increase the number of transactions, more procedures or rechecks can be scheduled, clients whose pets are due for recheck laboratory testing can be called for a reminder, or new services can be offered. To increase the amount of each transaction, more wellness tests, pet food, over-the-counter items or vaccinations can be sold.*

10) What is a profit and loss statement (P & L)?

**Answer: It is a financial report that lists income and expenses.**

11) Why is a profit and loss statement important?

**Answer: It is the tool a practice uses to monitor gross and net income.**

12) How much of each dollar is used to pay paraprofessional team members (i.e., everyone except the doctors)?

[Note to Trainer: Use a P & L to show where the money goes. A common perception among inexperienced employees is that the money goes right into the boss’s pocket. This is a good opportunity to show how much it costs pay team members, maintain the building, pay for insurance, utilities, supplies, etc.]

**Answer:**

13) How much of each dollar is used to pay for medicines and supplies?

**Answer:**

14) How much of the practice’s income is generated from boarding?

**Answer:**

15) How much of the practice’s income is generated from laboratory testing?

**Answer:**

16) Are these numbers higher or lower than national averages? Why?

**Answer:**

17) How much money do we spend on heartworm preventative medication each year?

**Answer:**

18) What is an ACT/ATC?

**Answer: Average cash transaction or average transaction charge. This is the dollar amount of an average invoice.**

19) How many dollars per day does our practice need to “break even”?

[Note to Trainer: Divide your annual expenses by the number of days you are open.]

**Answer:**

20) If an ACT is $100, how many transactions per day are required to “break even”?

**Answer:**

21) If five of these transactions are surgeries and you eliminate those, how many appointments need to be seen in each appointment block to “break even”?

**Answer:**

22) How many times per year does your average client book an appointment?

**Answer:**

23) How does this average compare with other clinics?

**Answer:**

24) How could this be improved?

**Answer:**

25) What is the difference between an invoice and a statement?

**Answer: An invoice is used for a single transaction. A statement is a compilation of invoices (e.g., for each month).**

26) What types of bills are paid by invoice and which bills are paid by statement?

**Answer:**

27) What is an inventory turnover rate?

**Answer: It is a measure of how long inventory items stay on the shelves before they are sold.**

28) Why is it important?

**Answer: Items that sit on the shelf for a long time are not profitable.**

29) What is excess inventory?

**Answer: Inventory that is purchased in excess of the practice’s needs.**

30) What is our practice’s system for reordering inventory?

**Answer:**

31) What role does each of the trainees play in reordering inventory?

*Sample Response: Selling it, recording what is used in-house, noticing when things need to be reordered.*

**MODULE 11: Business and Communication**

**Lesson 3: Building Maintenance and Practice Operations**

1) What is our practice’s address and phone number?

**Answer:**

2) What is our practice’s e-mail address?

**Answer:**

3) What is our practice’s website address?

**Answer:**

4) How do clients find our website?

**Answer:**

5) Who actually owns the building and is responsible if something breaks (e.g., a window)?

**Answer:**

6) Who has keys to the clinic?

**Answer:**

7) Who has the codes to arm and disarm the alarm?

**Answer:**

8) Explain what happens and what to do if the alarm system is set off by mistake.

**Answer:**

9) What are the most frequent errors that set off the alarm unnecessarily?

**Answer:**

10) What needs to be done before everyone leaves the building so the alarm is not accidently activated?

[Note to Trainer: Lock up the clinic cat? Check all the exterior doors and windows?]

**Answer:**

11) Does our practice have a fire alarm system?

**Answer:**

12) Does our practice have a list of people to contact for general, plumbing, or electrical repairs?

**Answer:**

13) Who does our practice contact with computer concerns?

**Answer:**

14) How does our practice work with the local humane society?

**Answer:**

15) Which business associates are important to our practice?

[Note to Trainer: The business’s accountant, doctors we refer to, our management consultant. etc.]

**Answer:**

16) What is VIN?

**Answer: Veterinary Information Network**

17) How are packages mailed? Does UPS pick them up or does someone go to the post office?

**Answer:**

18) Who repairs the photocopier?

**Answer:**

19) Who has the authority to buy a new photocopier?

**Answer:**

20) Who has the authority to buy new medical equipment for the hospital?

**Answer:**

21) Who has the authority to buy new medications?

**Answer:**

22) Who in the practice authorizes repair of equipment?

**Answer:**

**MODULE 11: Business and Communication**

**Lesson 4: Office Supplies**

1) Who purchases office supplies and where are these purchased from?

**Answer:**

2) Who receives the office supplies?

**Answer:**

3) Where are the toner/ink cartridges kept?

**Answer:**

4) How are more toner/ink cartridges ordered?

**Answer:**

5) Where are stationary and business cards ordered from?

**Answer:**

6) How often is stationary reordered?

**Answer:**

7) How much money does our practice spend each year on printing costs?

**Answer:**

8) Who purchases cleaning supplies? When is this done and where are they purchased from?

**Answer:**

9) Who is responsible for sorting the mail?

**Answer:**

10) Where do the bills go?

**Answer:**

11) Does our practice have a petty cash box? How is it used?

**Answer:**

12) Does our practice have a postage meter or a postal permit?

**Answer:**

13) Where are warranties and equipment manuals kept?

**Answer:**

14) Who sends coupons or rebate forms in?

**Answer:**

15) Does our practice have a label maker?

**Answer:**

16) Does our practice have a paper cutter?

**Answer:**

17) Does our practice have a document shredder?

**Answer:**

18) Where is packing tape kept?

**Answer:**

19) Where are mailing labels kept?

**Answer:**

20) Where are the stamps kept?

**Answer:**

**MODULE 11: Business and Communication**

**Lesson 5: Medical Records**

1) How are the computerized medical records backed up? Where is the back up information stored?

**Answer:**

2) When does a computer entry need to be initialized?

**Answer:**

3) Describe all the information contained on the cover sheet of the record or the main screen on your computerized medical records.

**Answer:**

4) Is a master problem list included in our practice’s medical records?

# [Note to Trainer: POMR stands for Problem Oriented Medical Record. In this type of record keeping system, the first page of the record has a master problem list for quick reference that lists the patient’s major disease problems or medications.]

**Answer:**

5) Who is responsible for noting a disease on the problem list?

**Answer:**

6) Who is responsible for noting the items recorded on a patient’s problem list?

[Note to Trainer: Does your practice have a standing policy regarding pets with existing problems that are scheduled for procedures or should the CCR or file manager ask a doctor?]

*Sample Response: Everybody. For example, if one of the problems listed is a food allergy, is it acceptable for a team member to give the dog a liver treat to get it to sit on the scale? If a team member is calling to confirm a surgery appointment for the next day and diabetes is listed as one of the patient’s problem list, what should the owner be told regarding food and insulin the morning of the surgery? What if he pet has heart disease? Should the owner give the dog its heart pills the morning of the surgery?*

7) What do the letters “A” and “P” mean in a medical notation?

**Answer: The A and P are part of the SOAP system (a medical record method). S = “subjective” (i.e., the history and information you get from the client), O = “objective” (i.e., temperature, heart rate, laboratory test results, X-ray and physical exam findings), A = “assessment” (i.e., a diagnosis, a problem, or a list of several possible diagnoses), and P = “plan” (i.e., what the doctor wants to do).**

8) What do Hx, Rx, Dx, and Sx stand for?

**Answer: History, prescription, diagnosis and surgery, respectively**

9) Where are medical records kept that are faxed over from another practice?

[Note to Trainer: If you are a paperless practice, do you scan them in?]

**Answer:**

10) Where are client information forms (that new clients fill out) kept? How is this information entered into the computer?

**Answer:**

11) How are vaccinations recorded? Are the stickers from the vaccine bottles kept anywhere?

**Answer:**

12) How is a client’s credit card number maintained on file?

**Answer:**

13) How are client confidentiality and the medical record maintained?

**Answer:**

14) What is the procedure if another clinic calls requesting records?

**Answer:**

15) What is the procedure if a client calls requesting their pet’s medical record?

**Answer:**

16) What is the procedure if a humane society requests a medical record?

**Answer:**

17) Does our practice charge a client for copying or faxing a medical record?

**Answer:**

18) When are clients likely to call requesting a copy of their rabies certificate?

*Sample Response: Usually at the end of the year when people are paying their property taxes and renewing their pet license.*

19) How does our practice record a service that was offered to the client but declined?

**Answer:**

20) Why is it important to record that a certain service was offered?

**Answer:**

21) What materials need to be recorded in the medical record for a two year old dog during a routine vaccination appointment?

**Answer:**

22) Is this the same or different information than needed for puppies, kittens, or senior pets?

**Answer:**

23) What happens when a new box of rabies vaccine is opened?

[Note to Trainer: Do you need to change the rabies serial number in the computer?]

**Answer:**

24) When filing medical records, does Madison or McAllister come first?

[Note to Trainer: This is a good opportunity to relay the, “Leave no file behind” theory. This take-off on, “Leave no child behind” reminds team members to keep track of medical records instead of scattering them all over the hospital. Also, in a court of law, if it’s not written in the medical record, it didn’t happen. Good record keeping is essential to good medical care.]

**Answer:**

**MODULE 11: Business and Communication**

**Lesson 6: Practice Philosophy**

1) What are the American Animal Hospital Association (AAHA) Standards?

**Answer:** **Since 1933, AAHA’s leaders and other veterinary experts have developed specific written standards for companion animal practices. These standards have undergone numerous changes, most significantly the 2005 enhancements. AAHA wanted to ensure they reflect the developments made over the past years in veterinary medicine in addition to AAHA’s team philosophy. They cover the following areas:** Anesthesia, Client Service, Contagious Disease, Continuing Education, Dentistry, Diagnostic Imaging, Emergency, Examination Room, Housekeeping, Human Resources, Laboratory, Leadership, Medical Records, Pain Management, Patient Care, Pharmacy, Safety, and Surgey.

2) What items do the AAHA practice consultants look at when they evaluate a hospital?

**Answer:**

3) Why do hospitals get accredited by AAHA?

**Answer:**

4) What is our practice’s mission statement?

**Answer:**

5) What are our core values?

**Answer:**

6) What does “professionalism” mean?

**Answer:**

7) What does good nursing care mean to our practice?

*Sample Response: Empathy, compassion, kindness, individualized, and state-of-the-art care. The essence of good nursing care is to think about how the pet is feeling and to do something about it. Is the patient nauseous? Hungry? Thirsty? Cold? What could you do to make the patient more comfortable and less painful?*

8) What can technicians do that other team members cannot?

**Answer:**

9) What can doctors do that other team members cannot?

*Sample Response: Create treatment and diagnostic plans, Prescribe medication and perform surgery.*

10) Who is responsible for all other activities in the hospital?

**Answer: The team! It’s not cost effective for veterinarians to trim toenails, take radiographs or take sole responsibility for all aspects of client education.**

11) Does our hospital have interns, externs, or students?

**Answer:**

12) Does our practice have team meetings? Why are team meetings beneficial?

**Answer:**

13) What is CE?

**Answer: Continuing Education**

14) Why is CE important?

**Answer: Fifty percent of our medical knowledge becomes outdated every five years. It is important to keep abreast of new drugs, tests, techniques, vaccines, and theories.**

15) When a decision is made in the practice, there are several ways you can respond: you can back it enthusiastically 100% because you believe in it; you can disagree with it but back it 100% anyway because you are part of the team; you can disagree but keep it to yourself, or; you can fight it. What is the least appropriate response?

**Answer: Fighting it is never appropriate. It is not acceptable for team members to undermine, complain, sabotage, or otherwise interfere with decisions that the practice has made. It would be more appropriate and professional to ask to discuss an issue but once the team agrees on the color of the uniforms or the protocol for pain management (for example) all team members need to adhere to the hospital’s policy.**

**MODULE 11: Business and Communication**

**Lesson 7: Human Resources**

1) Why are periodic performance evaluations important?

*Sample Response: Performance evaluations help to align individual goals with team goals. They help to address and solve performance problems. Positive feedback helps people to grow and improve.*

2) Why are job descriptions important?

**Answer:**

3) Do new employees have an introductory or probation period? What is the length of this period?

**Answer:**

4) When do performance evaluations take place?

**Answer:**

5) Are pay increases approved at the time of performance evaluations?

**Answer:**

6) Can team members earn bonuses in addition to their regular salary?

**Answer:**

7) What does, “If you can lean, you can clean” mean?

**Answer: The phrase, “If you can lean, you can clean” is often used in the food service industry. In veterinary medicine, it refers to the fact that there is always something to do at a veterinary hospital.**

8) Will a team member be fired if he or she steals stamps or paper or pens?

**Answer:**

9) Why might an employee be asked to leave?

**Answer:**

10) Why might a team member be sent home without pay?

**Answer:**

11) What disciplinary steps does our hospital use?

*Sample Response: Verbal and written warnings, suspension/paid time off, termination*

12) Where are employee (human resources) files kept?

**Answer:**

13) Who has the right to access a team member’s employee file?

**Answer:**

14) Who has the right to know a team member’s rate of pay?

**Answer:**

15) What is our hospital’s policy regarding illnesses? Is each team member responsible for calling a coworker to work for them?

**Answer:**

16) How does a team member request vacation days? Is there a calendar somewhere marked with the employees’ vacation dates?

**Answer:**

17) Who assigns work hours/shifts? When are the shifts assigned and how frequently or how far in advance?

**Answer:**

18) How can disputes between coworkers be resolved?

*Sample Response: Confront the coworker when everyone is calm, not angry. Begin your discussion with the end in mind: what would be the best outcome you could achieve? Use “I” phrases. Listen, think, solve, collaborate, follow-through, and involve a manager if necessary.*

19) Explain the difference between an “I” phrase and a “You” phrase.

**Answer: I phrases are less accusatory and will often result in a less defensive response. Instead of saying, “You make me feel,” try, “I feel \_\_\_\_\_\_ when \_\_ \_ happens.”**

20) Why are personality styles important?

**Answer:**

21) How do generational differences affect us?

**Answer:**

22) Explain relationship points.

**Answer: We all subconsciously keep score on each other. When you do something nice you get points added. When you do something bad you lose points. If you have a lot of points with someone, you can mess up and still stay in their good graces. If you lose enough points, either many all at once or little by little, eventually the relationship will disintegrate.**

23) List three things that impress our practice owner/manager.

**Answer:**

24) List three behaviors that show good communication skills.

**Answer:**

25) List three behaviors that show poor communication skills.

**Answer:**

26) What percent of an employee’s success at any job is due to technical or communication skills?

**Answer: According to Zig Ziglar, a well-known speaker and writer on business and communication topics, only 15%-20% of an employee’s success is due to their medical skills. The other 80%-85% is due to their people skills.**

27) What is a “dinosaur brain”?

**Answer: This idea comes from the book *Dinosaur Brains: Dealing with all those Impossible People at Work*. A dinosaur brain is the “primitive” part of your brain that reacts emotionally (i.e., gets angry, defensive, panics, bursts into tears, etc). The goal is to control our dinosaur brain and instead use the logical, thinking upper parts of the brain (Bernstein and Rosen 1996).**

28) What is the best part about working with our team?

**Answer:**

29) What is the best part about your work here?

**Answer:**

30) What is the best part about our practice?

**Answer:**

**Module 11 Suggested Reading**

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