**MODULE 7: OUT-PATIENT, EXAM ROOM, AND FRONT DESK**

**Lesson 1: The Client Visit**

1) What are the CCR’s responsibilities when a client arrives for an appointment?

**Answer:**

2) How is each appointment checked off as the patient arrives?

**Answer:**

3) How are the other team members notified that the patient is here and ready to be seen?

**Answer:**

4) When should a CCR avoid petting a patient?

[Note to Trainer: Is the medical record marked so the receptionist knows if a patient is aggressive?]

*Sample Response: You should never reach over the desk to pet a dog; this is a very threatening stance in the eyes of the dog. It is best to go around and pet the dog if that is what you want to do.*

5) If the CCR is checking one client out and a second client arrives for their appointment, what should the CCR do?

[Note to Trainer: Should the CCR acknowledge the client that just arrived (e.g., smile, nod) or should the CCR finish checking out the first client?]

**Answer:**

6) If one CCR is pulling files for the next day, the other CCR is on the phone, and a client walks in the door, what should happen?

**Answer:**

 7) The CCR is speaking with a client on the phone at the front desk, a client enters the hospital for their appointment, a doctor hands the CCR an invoice for the client that is ready to leave, and another CCR is in the office eating dinner. What should happen?

**Answer:**

8) A client is at the front desk and is upset and complaining about their bill while a second client is waiting to be checked out. How does the CCR manage this situation?

[Note to Trainer: Do you try to get the unhappy client out of the waiting room? Should the CCR get a manager to help?]

**Answer:**

9) Two telephone lines are ringing and a doctor hands you an invoice to check out the last patient. What should the CCR do first?

**Answer:**

10) What should the CCR do if a client has been waiting in the reception area for awhile?

**Answer:**

11) What does our practice consider “awhile”?

**Answer:**

12) When should a CCR offer a tour of the clinic?

**Answer:**

13) What is a new client speech and why is it important?

[Note to Trainer: Who informs new clients about the hospital, doctors, services, hours, etc.?]

**Answer:**

14) When does a CCR or other team member hand out business cards?

**Answer:**

15) When should a CCR or other team member introduce themselves to a client?

**Answer:**

16) Does a pet need to be weighed at every visit?

[Note to Trainer: If the dog was examined just last week and she or he is being admitted today for boarding, does the dog need to be weighed again? Do hyperthyroid cats being rechecked for T4 levels need to be weighed? Do euthanasia cases need to be weighed? If one dog is barking and lunging at another dog in the lobby, are they both weighed? Can a fractious cat be weighed inside the carrier?]

**Answer:**

17) Where are body weights recorded in the medical record? What units (pounds or kilograms, tenths of a pound or pounds and ounces) are preferred?

**Answer:**

18) A sick dog urinates on the floor in the lobby. Does it get cleaned up immediately?

[Note to Trainer: Should a urine sample be saved in case the doctor needs it?]

**Answer:**

19) What are the veterinary assistant’s and veterinary technician’s responsibilities when a client arrives for an appointment?

**Answer:**

20) Where is the client folder/medical record/file placed while the client is waiting in the exam room?

**Answer:**

21) If a client has been waiting for “awhile” in the exam room, what should happen?

**Answer:**

22) How long is it acceptable for a client to wait in the exam room until the doctor is available?

**Answer:**

23) How can the team shorten or minimize the amount of time that a client needs to wait?

*Sample Response: Schedule appointments appropriately, be prepared ahead of time (e.g., have the file ready and know what the appointment is for), let the doctor know when the next client has arrived, and help prepare medications or obtain samples for the doctor.*

24) What happens if a pet comes in for radiographs and the processor has not been turned on?

[Note to Trainer: How long does it take for the processor to warm up? What other situations exist in practice that make clients wait unnecessarily because team members were not prepared or did not check the appointment schedule?]

**Answer:**

25) Who is responsible for turning on the radiograph processor or setting up for the appointments?

[Note to Trainer: Who prepares for appointments and makes sure that everything is ready before the client arrives?]

**Answer:**

26) What should you do if a client is ready in room two and the doctor is still in room one?

**Answer:**

27) When are pets scanned for a microchip?

[Note to Trainer: Is this part of a routine physical exam or wellness exam to ensure the chip is still appropriately placed?]

**Answer:**

28) What could the veterinary assistant do if the doctor is trying to speak with a client but the client’s children are being disruptive?

*Sample Response: The doctors count on the team to help keep children entertained with coloring books, a DVD, or a toy so they can concentrate on the pet’s and client’s needs. This appointment may be the only time the doctor and client have to spend together all year or they may be discussing a serious illness or euthanasia.*

29) What is the assistant doing while the doctor is speaking with the client?

**Answer:**

30) What is the assistant doing while the doctor is performing a physical exam?

*Sample Response: A skilled assistant can anticipate each step of the exam and help to make it go smoothly. Ways of assisting include holding the mouth closed while the doctor listens to the lungs, keeping the dog standing up for the abdominal palpation or hip range of motion, or restraining a cat appropriately if it tries to jump off the table. The assistant should be actively involved in the exam, not simply standing beside the pet.*

31) What is the goal of mentioning our hospital’s services to a client before the doctor comes in?

*Sample Response: To provide repetition, continuity, and consistency. If every team member recommends the same thing, the client will feel more comfortable. For example, an assistant could say, “Dr. Jones will want to speak with you about Fluffy’s dental tartar. It looks like she needs her teeth cleaned.” Or, “Please read this information about senior wellness testing while you are waiting for the doctor. Blood testing is important for senior pets like Spot.”*

32) Who checks patients out?

**Answer:**

33) Who cleans the rooms so that they are ready for the next patient?

**Answer:**

34) Who puts the next patient in the newly available room?

**Answer:**

35) How does the veterinarian or technician relay what charges should be applied?

**Answer:**

36) Who puts the charges in the computer?

**Answer:**

37) Who makes sure the charges are all correct before the client is checked out?

**Answer:**

**MODULE 7: OUT-PATIENT, EXAM ROOM, AND FRONT DESK**

**Lesson 2: Puppy and Kitten Visits**

1) What are some typical questions asked on a first puppy or kitten visit?

*Sample Response: Where did you get the puppy? How long have you had it? What vaccines or deworming has it had? How is the housebreaking coming along? Is the puppy mouthing, barking, jumping, behaving aggressively or fearfully?*

2)Does our hospital offer puppy and kitten programs?

[Note to Trainer: Do you have packages that describe all of the services a puppy or kitten will need over the next few months? If so, discuss what is required and the cost associated with these services or products cost.]

**Answer:**

3) How long does it take to get a history and review a puppy program with a new client?

[Note to Trainer: How long does the assistant need in the room before the doctor comes in? How long does the doctor need for a new puppy or kitten visit?]

**Answer:**

4) When do we recommend clients start puppy or kitten classes and why?

**Answer:**

5) What is included with each puppy visit?

**Answer:**

6) What is included with each kitten visit?

**Answer:**

7) Are puppy or kitten kits distributed to all puppies or kittens on their first visit? If so, what is in them?

**Answer:**

8) What other free samples does our clinic offer to clients?

[Note to Trainer: This might include shampoo samples, treats, food, bandanas, toothbrush and toothpaste, or a small toy.]

**Answer:**

9) Does the doctor require assistance for the first puppy or kitten visits?

*Sample Response: The doctor may not require help with restraint; however, the veterinarian will need deworming medication prepared, the stool sample processed, information regarding vaccine and worming status of the puppy or kitten transferred to the medical record, samples of puppy foods, and some uninterrupted time to talk with the client to set up an individualized health care program for the pet.*

10) What role do the technician and assistant play in the exam room for puppy and kitten visits in our hospital?

**Answer:**

11) When is a client given an exam report card? What information is on the report card?

**Answer:**

12) Are puppies or kittens with an upper respiratory tract infection (URI) still vaccinated?

**Answer:**

13) Are puppies or kittens with diarrhea still vaccinated?

**Answer:**

14) What diets does our clinic recommend for puppies and kittens?

**Answer:**

15) How does our clinic ensure that puppies and kittens have the appropriate heartworm and/or flea medication dispensed at every visit?

**Answer:**

16) Why is it important for a puppy or kitten to be examined as soon as the owners adopt it rather than waiting until the next set of vaccines are due?

*Sample Response: This is so we can discuss the answers to the above questions, deworm them, examine them for problems, send home heartworm and flea prevention, discuss proper nutrition, warn them about zoonotic diseases, and answer any questions the owners have. This is also an excellent opportunity to discuss socialization and behavioral issues.*

**MODULE 7: OUT-PATIENT, EXAM ROOM, AND FRONT DESK**

**Lesson 3: Common Situations**

1) A puppy diagnosed with parvovirus was examined in room one. How should this room be cleaned?

**Answer:**

2) A dog diagnosed with kennel cough was examined in room two. How should this room be cleaned?

**Answer:**

3) A cat diagnosed with ringworm was examined in room three. How should this room be cleaned?

**Answer:**

4) How should team members clean themselves after cleaning each of the three exam rooms described above?

**Answer:**

5) What is our infectious disease protocol and where is a copy kept?

**Answer:**

6) The doctor is in the pharmacy preparing medications for the last client. The next client is already waiting in an exam room. The phone rings but both CCRs are busy. Does the doctor dispense the medication and move onto the next client hoping someone else will answer the phone or does the doctor answer the phone and risk being sucked into a lengthy conversation?

**Answer:**

7) Important client information sheets were left behind in the patient’s file. What should you do?

[Note to Trainer: Should the CCR mail/fax/e-mail them or call the client to have them come back and pick them up?]

**Answer:**

8) What is the difference between a “combo test” and a “combo vaccination”?

*Sample Response: A combo vaccine generally refers to something like FVRCCP-FeLV whereas a combo test is used to test for both FeLV and FIV in a single blood sample.*

9) If a CCR or other team member doesn’t know the answer to a client’s question, what should they do or say?

**Answer:**

10) If a CCR or other team members “thinks” he or she knows the answer to a client’s question but isn’t 100% sure, what should he or she do or say?

**Answer:**

11) If a CCR or other team member learned something about pet care at another facility but isn’t sure what our practice recommends, what should he or she do or say?

[Note to Trainer: If the doctors recommend Gentle Leader® head halters but the new assistant was discussing prong collars with the client, the clients will be getting mixed messages and can become confused. Similarly, if a new veterinarian is recommending a certain vaccine or medication that the clinic either does not stock or the other veterinarians do not use, this could be viewed as unprofessional.]

**Answer:**

12) If a client says, “I can’t believe the X-rays are so expensive!” How do you respond?

*Sample Response: Empathize with the client, for example say “I used to think so too” and then explain why the radiograph (or other procedure) costs as much as it does.*

13) If a doctor has asked you to do one thing and the technician needs you for something else, what do you do?

**Answer:**

14) If the driver from the laboratory is waiting to pick up the blood samples and a client is waiting for you to dispense their medications and check out, what do you do first?

**Answer:**

15) If a new doctor is about to give a medication to a client and you know the practice owner would want her to use something else, do you say anything to the doctor?

**Answer:**

16) What should happen if you realize that you gave a client incorrect information about their sick pet?

**Answer:**

17) Do we ever give medical advice over the phone?

**Answer:**

18) What could happen if you give a client wrong first aid advice?

[Note to Trainer: Try to think of a story or incident that went wrong or could have gone wrong to illustrate this concept so it will be remembered better.]

**Answer:**

19) Is it important for each team member to give the same advice to clients? Why?

**Answer:**

20) How do you intervene when you hear a teammate giving incorrect information to a client?

**Answer:**

21) How important is it for each doctor to do things the same way?

**Answer:**

22) In room one there is a dog in need of a bandage change that the doctor needs to look at herself. The client in room two arrived 10 minutes late for their vaccine appointment. A technician and assistant are available to help. How does the team manage this situation?

[Note to Trainer: How does your team utilize each team member and what is considered to be “OK” to do?]

**Answer:**

23) There is a cat in room two for an annual exam and a dog in room one with an ear infection. How could the two appointments be managed most efficiently?

**Answer:**

24) If a client has arrived for a scheduled appointment but the file is missing, what should you do?

**Answer:**

**MODULE 7: OUT-PATIENT, EXAM ROOM, AND FRONT DESK**

**Lesson 4: Stocking and Supplies**

[Note to Trainer: It would be useful to walk to the trainees through a “mock examination” so they can learn where all the equipment and supplies are kept and what should be stocked in the exam room.]

1) What kinds of bandage materials should be in each exam room?

[Note to Trainer: Open some drawers, explain what is in the exam room and why. What do the doctors want to be in the drawers?]

**Answer:**

2) Where are the bulk bandage material kept?

**Answer:**

3) What other equipment or supplies are in each exam room?

**Answer:**

4) Where are the scissors, ear cones, or other dirty equipment placed and how are they cleaned?

**Answer:**

5) How is this equipment marked so the team members know which exam room they came from?

**Answer:**

6) What disinfectant is used to clean the exam rooms?

**Answer:**

7) What product is used to freshen a room (e.g., after expressing anal glands)?

**Answer:**

8) Who is responsible for stocking and cleaning the exam rooms?

**Answer:**

9) How often is this done?

**Answer:**

10) Do the different exam rooms get used differently?

[Note to Trainer: Do you see large dogs, cats, or exotics in a certain exam room? Is one room better for euthanasia appointments?]

**Answer:**

11) Where are bulk syringes kept?

**Answer:**

12) Where is the bulk alcohol or cleaning solution kept?

**Answer:**

13) What size syringes and needles do the veterinarians commonly use that will need to be stocked in the exam rooms?

**Answer:**

14) Where do used syringes and needles go?

**Answer:**

15) How does our practice advise clients to dispose of their used sharps (e.g., if they are giving their pet insulin or SQ fluids at home)?

**Answer:**

16) When is medical waste picked up?

**Answer:**

17) A client comes in for LRS and IV sets to give SQ fluids to their pet at home. Where are these items kept?

**Answer:**

18) What other supplies might this client require?

*Sample Response: Needles*

19) Where is our pet food of choice for anorectic patients kept? If the veterinarian has recommended feeding a slurry to a sick animal, what other supplies will the owner need?

*Sample Response: An appropriate syringe*

20) Where are the rabies tags?

**Answer:**

21) What happens if an owner loses their rabies tag?

*Sample Response: They are issued a new tag and the new tag number is recorded in the patient’s medical record.*

22) Where are the health certificates?

**Answer:**

23) When are health certificates issued?

**Answer:**

24) Where should the CCR or other team member place a phone message for the doctor so she or he finds it after exiting an exam room?

**Answer:**

25) The pharmacy label printer is almost out of labels. What should you do?

**Answer:**

27) Where is the packing tape located?

**Answer:**

27) Where are the **otoscope** and cones kept?

**Answer:**

28) Where would you find a new otoscope battery or light bulb?

**Answer:**

29) What is **fluorescein stain** used for and where is it kept?

**Answer:**

30) How do we calibrate the Tonopen™ (or whatever tonometer you use)?

**Answer:**

31) What is it a tonometer used for?

**Answer: It is used for measuring intraocular pressure (e.g., in patients with glaucoma).**

33) What is a **laryngoscope**?

**Answer: A laryngoscope is a medical instrument for examining the larynx.**

33) When is a laryngoscope used?

**Answer: It is used when we need to explore the mouth for a foreign body or tonsillitis or to intubate an animal for general anesthesia.**

34) What other pieces of equipment are kept in the exam rooms or are used frequently by the doctors?

**Answer:**

**Module 7 Suggested Reading**

American Animal Hospital Association. 2008. *Client Service Standards. AAHA Standards*. Lakewood, CO: AAHA

American Animal Hospital Association. 2008. *Patient Care Standards*. *AAHA Standards*. Lakewood, CO: AAHA

White, Linda. 2009. *First Steps with Puppies and Kittens: A Practice-Team Approach to Behavior.* Lakewood, CO: AAHA Press.

Wilson, James F., and Carol McConnell. 1995. *Veterinary Receptionist’s Training Manual*. Lakewood, CO: AAHA Press.