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## INTRODUCTION

Congratulations! Being a receptionist in a veterinary practice is one of the most interesting and rewarding jobs you will ever have—and one of the most important positions at your veterinary clinic.

You represent the animal hospital. The doctor speaks through you. You are the first person clients meet when they come to the clinic and the last person they see when they leave. In fact, statistics show that one of the main reasons why clients switch from one practice to another is that they've encountered an indifferent and unwelcoming attitude in the front office.

You are the welcoming committee, the pleasant voice on the telephone, the helpful hand in the reception area, the appointment secretary, the bookkeeper, the question answerer, the scheduler, the director of sales, and the public relations department.

You are a very important person!

*The dvm360 Veterinary Receptionist's Handbook* is designed to help you in your job, whether it's your first day or you've got years of experience on the job.

As you read this book, you will learn how to make clients feel welcome and how to demonstrate the care that your hospital provides their pets (your most important job!), how to be a good communicator (your other most important job!), and how to organize the many details of everyday life in a busy animal hospital (yes, your other most important job!).

If you're a new receptionist, you'll probably find it helpful to start with Chapter 1 and go through each chapter in order. Of course, any chapter may be referred to as needed for help with a particular situation. Or, if you're an experienced receptionist, you may want to customize the information to fit your clinic's policies and then keep the book within easy reach to be used as a reference.

You'll probably find that it's a good idea to tab some of the pages for quick reference. As you'll see, many of the pages contain information specific to your clinic, and you'll want to refer to them daily.

Every receptionist needs to be able to answer clients' basic questions. The more you understand everyday medical procedures, the less often you'll have to interrupt the doctor with questions. That's

why Chapters 11 through 17 provide you with essential information on immunizations, surgery, parasites, and diagnostic tests.

Chapters 18 and 19, Commonly Asked Questions, cover what clients most often ask veterinary receptionists about their pets. The appropriate answers—along with additional space to fill in more specific information about your clinic’s services and policies—are included. The more you study these questions and answers, the more confident you will feel and the better you will be able to communicate the right information to your clients.

And you’ll hear lots of new terms. So there’s a glossary of common veterinary terms and abbreviations in the back of the book. Again, the more you study and commit these to memory, the more confident you’ll feel and the more successful you’ll be!

Best of luck in your career as a veterinary receptionist. There’s no question that when clients see your smiling face, they’ll know they’ve brought their beloved pets to the right place!

# CHAPTER 1

## *Making a* **Good First** *Impression*

How many times have you walked into a business and found yourself ignored by the people who work there? It's not a pleasant feeling, is it? It makes you feel angry or like turning right around and walking out. In fact, you didn't have a very good first impression of that business, did you?

### **The Receptionist's Golden Rule**

You are the first person clients talk to on the phone and meet when they enter the waiting room. The image you project will give them their first impression of your hospital. Your job as veterinary receptionist is to make sure your clients never feel ignored and to make each client understand how much you, the doctor, and the entire hospital team sincerely care about his or her pet. In fact, your golden rule is:

*Make the clients feel welcome. Show how much you care that they've chosen your clinic.*

When clients walk into your clinic, smile. Greet them, their pets, and their children by name. If you are on the phone when clients walk in, smile and wave to let them know you have seen them and will soon be able to help them.

If you're new and don't know the clients, don't despair. If you're on the appointment system, you should know who will be coming in. Many practices are now taking pictures of the pet and including it in the pet's digital medical file so you recognize the pets coming in. Be familiar with the pets in the family, especially if they have pictures in their files. If you're not on the appointment system, a sign-in sheet can be a valuable aid. If you have no idea who a client is, ask! Then smile and use his or her name. Introduce yourself, and speak to the patient too!



#### **TIP**

**Your clients like to know who you are, too. Wear a name tag that gives your name and title, or place a nameplate on your desk.**

**SAMPLE SITUATION**

*A client with no appointment calls and wants his new puppy to be seen today to begin its series of vaccinations.*

You say: *“We will be happy to take care of that for you. What is your name?”*

Client: *“John Jones, and my puppy is Tippy.”*

You: *“Mr. Jones, I know this will be Tippy’s first visit, but have you been in with other pets?”*

Client: *“About two months ago I brought my cat in.”*

You pull his chart and say: *“Yes, I see that on your chart. How is Felix feeling now? It will take me just a few minutes to set up a file on Tippy.”*

You proceed to get all the vital information on Tippy, set up his file, then say: *“We can see Tippy tomorrow at 10 a.m. or 3 p.m. Which of these times will work best for you?”*

With this approach, you let the client know the veterinarian wants to see the pet and you will get him on the schedule as soon as possible.

In every situation, make sure clients see how glad you are that they have chosen your clinic. If you do this, you automatically project a friendly, caring image of your clinic and help clients feel at ease and receptive as they head to the exam room to see the doctor. Remember, if a client receives an unpleasant welcome at your hospital, he or she can visit any number of other clinics.

**TIP**

**Act professional—that’s what you are! There’s no need to gush over a client and a pet. A smile, a pleasant tone of voice, and genuine interest in the client and pet are all that’s needed.**

**The Five-Minute Rule**

As friendly as you are, clients don’t come to your clinic to spend time with you! They come to bring their pets to the doctor. So, another important rule you’ll want to follow is:

*Don’t keep the client waiting.*

Ideally, a client should not have to wait more than five minutes before taking his or her pet to an exam room. Circumstances (such as emergencies) occasionally will disrupt smooth traffic flow, but you'll find that the five-minute rule will help you—especially on days when the waiting room is full.

Use your five minutes with the client wisely. Verify the address and phone number to ensure your records are up-to-date. Be sure to ask the reason for the visit if you didn't ask when the client scheduled the appointment. (See Chapter 6.)

### POINT TO PONDER

*All pets are created equal, especially in the eyes of the owner. A dog with a fancy pedigree is not “better” than a Heinz 57 mix. The qualities of a good pet—companionship, friendliness, and loyalty—cannot be put down on a registration form.*

### The Unavoidable Delay

There will always be times when a client shows up right on time for an appointment and the doctor is unavailable to see the pet. Lengthy surgical procedures, emergencies, or simply a long series of appointments can all throw off your schedule.

When this happens, explain the situation to clients, tell them how long a delay to expect, and give them the options of waiting or leaving their pets at the clinic and picking them up when it's convenient. You can also ask if they'd like to reschedule their appointments.

Most clients will choose to wait, so don't forget they're in the waiting room! Keep them posted on the doctor's progress and let them know about any changes that could make the wait longer or shorter.

### SAMPLE SITUATION

*An injured dog has been brought to your clinic, and the doctor must stabilize it before seeing any more clients. When Mrs. Smith appears promptly at 10 a.m. for Mitzi's appointment, you smile and say:*

*“Good morning, Mrs. Smith. You and Mitzi are right on time, but we are running a little bit behind. The doctor had to stop to treat an injured dog, and I expect the delay to be about 20 minutes. I'm sorry for the inconvenience to you. And if you're unable to wait, I'll be glad to reschedule your appointment or keep Mitzi here for treatment until you can come back for her.”*

**TIP**

**When the schedule is disrupted, try to call clients in advance to reschedule. They'll appreciate the consideration, and you won't have impatient clients in the waiting room.**

**The Telephone: The Clinic's Lifeline**

The waiting room is full. A dog is barking. A client's new kitten is halfway up the curtains. And, of course, the telephone is ringing. Wait! Don't touch that phone. Take a deep breath. **SMILE**. Now pick up the phone and answer it.

The telephone is the clinic's lifeline. Without it, business would fade away. That's why it's so important to answer it properly. Your ability to project a good image of your clinic over the telephone depends on your being able to answer questions confidently and accurately (see Chapter 2) and on following your golden rule: Make the clients feel welcome and show that you care about them and their pets! This applies to all clients—those on the phone as well as those in the waiting room.

The first step when you answer the phone is to smile and use a pleasant tone of voice. Remember, how you say something can be more important than what you say! In fact, the most important parts of a telephone conversation are tone and inflection. Next, identify your clinic and give your name. For example: "Main Street Animal Clinic. This is Debbie speaking." People like to know to whom they are speaking. It puts them at ease. Step number three, believe it or not, is the hardest: Listen to what the person on the phone says. Let callers know you are interested in them and their pets.

**TIP**

**The phone shouldn't ring more than twice before you answer it. If you can't answer it by the second ring, ask someone to answer it for you.**

**TIP**

When you are on the telephone, smile and speak slowly and clearly. You are your clinic's communication link to the outside world. Be sure the outside world can understand you! Remember, your smile radiates through your voice.

**POINT TO PONDER**

*No client's question is too trivial, even if you have already answered it 10 times that day. When Mrs. Jones asks it at 6 p.m., it will be the first time for her. Treat her with the same courtesy and respect you gave the first client at 8 a.m.*

**The Hold Button**

There will be times when you must put callers on hold while you research answers to their questions or finish some business with clients in the waiting room. Use your hold button as seldom as possible, but if you must use it, say, for example, "I am on the other line. May I ask you to hold for just a moment? Thank you." Get back to the caller as soon as possible and say, "Thank you for holding. How may I help you?" or "Thank you for holding. I have the information you wanted." **NOTE:** If your practice uses on-hold marketing messages, make sure you're familiar with the messages and can answer any follow-up questions clients might ask.

**"I Need to Talk to the Doctor"**

You will quickly realize that doctors are very busy people. The fewer times they are interrupted, the more time they have for medical work.

**TIP**

Always give callers the option of having you call them back if they don't want to hold. Take the caller's name and number and confirm that someone will be there in five or 10 minutes to receive your call.

Properly handled, routine calls need not interrupt their work.

But sometimes, no matter the question or situation, clients feel that they can get the right information only by talking to the doctor. These clients do not mean to belittle you. They simply do not know that anyone but the doctor is capable of answering their questions. When a client insists on speaking to the doctor, be cheerful and cooperative. Explain that the doctor is unable to come to the phone right now but that he or she will return the client's call at a certain time.

Your clinic may want to set aside 20 to 30 minutes in the morning and the afternoon for the doctor to return phone calls. Then you can tell the client about what time to expect the call. For example, "Dr. Cares is in the middle of a surgery. I know she will want to talk to you about your concerns about Fluffy. What's the best number to reach you?" In addition, you may ask, "Can I tell Dr. Cares why you're calling?" This may lead callers to ask you their question. (See page 52 to learn how to turn question calls into appointments.) Emergencies, of course, are handled immediately. (See Chapter 7.)

### Clinic Callback Policies:

#### **TIP**

**Be sure to convey to the caller that the doctor is busy seeing patients, making rounds, or in conference—that he or she is busy doing something and not just "too busy" to talk to the caller.**

**POINT TO PONDER**

*Clients pay for their time with doctors and they deserve their undivided attention. Don't interrupt patient visits with nonemergency questions.*

**“How Is My Pet Doing?”**

Anxious owners usually want to check on their hospitalized pets early in the morning, but the doctor may not have had a chance to make rounds when they call. Many clinics set a time for clients to call to check on hospitalized pets—for example, after 10 a.m. This gives the doctor time to check on hospitalized cases and postsurgical cases and to let you know about each pet's condition. Be sure to update reports on all animals by the designated time so you can give information promptly to callers. This reassures worried owners—and makes your job easier! Your practice may also have a policy to proactively call clients back to offer these reports. You may also choose to text pet owners with updates to reassure anxious pet owners and enhance the value of your service. This may be the technician's job, so make sure you know your clinic's policy.

**TIP**

A client's first concern when calling your clinic will be for the pet's condition. The next question will usually be, “How much is my bill?” Be sure you can answer both questions, especially for pets that will be discharged that day.

**Learn more**

Visit [dvm360.com/receptionist](http://dvm360.com/receptionist) for links to help you learn to offer estimates and treatment plans, tips to help you enhance the value of your service, and a sample script to help you avoid blowups over the bill.



Anxious owners often will call earlier than the designated time. To put your clients at ease, it is best to know whether there has been a drastic change in their pets' condition. If not, reassure them and tell them you will have complete details shortly. Do not put clients off by saying, "It's too early for you to call." After all, you care about their pets as much as they do, so communicate your concern in a reassuring way.

### Clinic Policy on Reporting Hospitalized Cases and Follow-up Phone Calls:

#### **SAMPLE SITUATION**

*A client calls first thing in the morning and says, "I brought my dog in last night at 11 o'clock. He was hit by a car. How's he doing?"*

*First, verify that the pet is not in immediate danger. Then tell the client, "Bowser is resting comfortably this morning. The doctor will have the complete details of his case a little later this morning. May we call you back at that time to let you know more?"*

*Write a note to remind yourself or the doctor to call the client back. It's your job to be sure the call is returned.*

Remember, the telephone works both ways. One of the best ways to project the positive, caring attitude of your clinic and to show your concern for your clients' pets is to follow up with your clients. Call the owners of all surgical cases the day after surgery

and say, “This is Debbie at Main Street Animal Clinic. Dr. Smith wanted to know how Tippy feels today.”

It’s important to follow up with the owners of ill pets as well. When owners are worried about their pets, nothing is as comforting as a call from a concerned veterinarian. Follow-up calls are good practice builders.

**TIP**

**When in doubt, SMILE! It is almost impossible to speak in an unpleasant tone of voice if you are smiling.**

Your computer will help you keep track of follow-up phone calls. Enter recheck dates for all ill pets and surgical cases, and the names and phone numbers will appear on a recheck report on the appropriate date. If your software doesn’t handle that, make a space in each day’s appointment schedule where you will write down the names and numbers of clients to call. Or you may use reminder software to trigger these important callbacks.

### **The Hard-to-Understand Caller**

Occasionally it will be hard to understand someone over the phone because he or she speaks indistinctly, has an accent or a speech impediment, or simply because of a poor connection. Maintain your pleasant tone of voice—don’t lose your patience!—and admit that you are having trouble understanding him or her. Ask the caller to speak slowly and to spell out his or her name and phone number.

### **SUMMARY OF IMPORTANT POINTS**

- Always ask the caller’s permission to place him or her on hold.
- Always give the caller the option of being called back.
- Don’t interrupt the doctor during an office visit for answers to routine questions.
- Smiles are infectious.