

WEEK ONE

Week one consists of learning the general operations of the clinic, focusing primarily on admissions & Clinic HQ (CHQ) software training.

Day 1:

- Review E-Learning documents:
 - *Admission Form:* http://humanealliance.org/elearning/Admission_Form.pdf
 - *Admissions Procedures:* http://humanealliance.org/elearning/Admissions_Procedures.pdf
 - *Cage Card Description:* http://humanealliance.org/elearning/Cage_Card_Description.pdf
 - *Cage Card Form:* http://humanealliance.org/elearning/Cage_Card_Form.pdf
 - Review E-Learning videos:
 - *Check-In Procedures:* <https://youtu.be/lolulbVTtHl>
 - *Cage Card Procedures:* <https://youtu.be/d5mp0JR9I6Q>
 - Observe intake of patients, focusing on the two counter roles & the greeter role
 - Review CHQ Training Center videos
 - All under *Getting Started* tab): <https://clinichq.org/help/tutorials>
 - Enter paperwork in CHQ
 - Check out patients in CHQ
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Day 2:

- Review E-Learning documents:
 - *Release Procedures:* http://humanealliance.org/elearning/Release_Procedures.pdf
 - *Post-Op Instructions:* http://humanealliance.org/elearning/Post-Op_Instructions.pdf
 - *C-Cat Post-Op Handout:* http://humanealliance.org/elearning/Client_Community_Cat_Post-Op_Handout.pdf
- Review E-Learning video:
 - Generic Post-Op Instructions: <https://youtu.be/yvwwldefAFI>
- Observe release of patients, focusing on the two counter roles & the greeter role
- Review CHQ Training Center videos:
 - All under *Checkout* tab): <https://clinichq.org/help/tutorials>
- Enter paperwork in CHQ
- Check out patients in CHQ

Days 3 & 4:

- Review E-Learning documents:
 - *Paperwork Flow Procedures:* http://humanealliance.org/elearning/Paperwork_Flow_Procedures.pdf
 - *FeLV Test Release Form:* http://humanealliance.org/elearning/FeLV_Test_Release_Form.pdf
 - *FeLV/FIV Test Release Form:* http://humanealliance.org/elearning/FeLV_FIV_Test_Release_Form.pdf
 - *Recheck Admission Form:* http://humanealliance.org/elearning/Recheck_Admission_Form.pdf
 - Review E-Learning video
 - *Paperwork Flow Procedures:* https://youtu.be/VZWX1F5x_Us
 - Participate in admission & release of patients, working the admin counter role & the greeter role
 - Review CHQ Training Center videos:
 - All under *Accounting, Reports, & Settings* tabs: <https://clinichq.org/help/tutorials>
 - Enter paperwork in CHQ & make changes from change sheet
 - Check out patients in CHQ
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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

Week two continues training in admissions & CHQ.

Days 1, 2, & 3:

- Participate in admission & 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
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Day 4:

- Participate in admission & release of patients
 - Review E-Learning video:
 - o *Trapped Cat Handling Procedures:* <https://youtu.be/hPnduEXFmP8>
 - Focus on community cats, including trap loan program, cat shelters, & special check-in & release procedures
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Day 5:

- Participate in admission & release of patients
- Focus on CHQ, including microchips, online booking, & reporting

WEEK THREE

Week three continues admissions & CHQ work & begins training on phones & appointment scheduling.

Day 1:

- Review E-Learning documents:
 - *Appointment Script:* http://humanealliance.org/elearning/Appointment_Script.pdf
 - *FAQ Handbook:* http://humanealliance.org/elearning/FAQ_Handbook.docx
 - *Booking to Capacity:* http://humanealliance.org/elearning/Booking_To_Capacity.pdf
 - Review E-Learning video:
 - *Appointment Setting Procedures:* https://youtu.be/_XKMyRPJAeo
 - Review CHQ Training Center videos:
 - All under *Scheduling* tab: <https://clinichq.org/help/tutorials>
 - Participate in admission & 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
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Days 2, 3, 4, & 5:

- Participate in admission & 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 & transport. At the end of this week, the trainee should be ready to take the Office Assistant Exam:

Day 1:

- Review E-Learning videos:
 - *Kennel Cleaning Procedures:* <https://youtu.be/NV9G0ok2zKU>
 - *Disease Prevention Procedures:* <https://youtu.be/5PFu7dvD25Q>
 - Participate in kennel cleaning & laundry
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Day 2:

- Review E-Learning document:
 - *Surgical Pack Procedures:* http://humanealliance.org/elearning/Surgical_Pack_Procedures.pdf
 - Review E-Learning video:
 - *Packs Preparation Procedures:* https://youtu.be/ByoXWR_DQTW
 - Participate in pack preparation & pack laundry
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Day 3:

- Review E-Learning video:
 - *Medical Flow Procedures:* <https://youtu.be/zJPeQocGmo8>
 - Shadow Veterinary Assistant throughout check-in, prep, surgery, & recovery
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Day 4:

- Review E-Learning document:
 - *Transport Loading:* http://humanealliance.org/elearning/Transport_Loading.pdf
 - Review E-Learning video:
 - *Transport Vehicle Loading Procedures:* https://youtu.be/wORpu0A_PT4
 - Ride along with Transport Assistant to pick up patients
 - Assist in unloading vehicle
 - Assist in cleaning vehicle
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Day 5:

- Assist in loading vehicle
- Ride along with Transport Assistant to return patients
- Assist in cleaning vehicle
- Review E-Learning document:
 - *Transport Manual:* http://humanealliance.org/elearning/Transport_Manual.pdf
- 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.

Day 1, 2, 3, & 4:

- Review Humane Alliance website:
 - *Open a Clinic* pages: <http://humanealliance.org/open-a-clinic>
 - Shadow Office Manager/Office Assistant's training – all classes & modules
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Day 5:

- Review Humane Alliance website pages:
 - *Fix Your Pet*: <http://humanealliance.org/fix-your-pet>
 - *Extern Training*: <http://humanealliance.org/extern-training>
 - *Vet Training*: <http://humanealliance.org/vet-training>
 - *Team Training*: <http://humanealliance.org/team-training>
 - *Consult Program*: <http://humanealliance.org/consults>
 - *Vet Assistant Course*: <http://humanealliance.org/vet-asst-course>
- Meet with Training Program Manager for overview of Extern Training Program
- Meet with Training Program Coordinator for overview of Veterinarian Training Program

A quiz which tests employees on the content of this checklist can be found in our E-Learning materials (http://humanealliance.org/elearning/Exam_Office_Assistant.docx)