Vet receptionist onboarding checklist

ONBOARDING CHECKLIST TEMPLATE

Employee _____ Role _____ Start date _____

Buddy or manager _____

Onboarding

From the signed offer to the first month

	TASK	DUE	DATE	INITIALS
	First day			
☐	Tour the clinic and show the exits, first aid kit and fire equipment	Day 1		
☐	Set up their login to the practice management system	Day 1		
☐	Introduce the vets, nurses and their usual days	Day 1		
	First week			
☐	Train on booking each appointment type and its length	Week 1		
☐	Train on recognising emergency calls and putting them through to a vet or nurse Such as breathing problems, collapse, bleeding, bloat, poisoning or a difficult birth.	Week 1		
☐	Train on checking in patients and admissions	Week 1		
☐	Train on estimates, payments and insurance claims	Week 1		
☐	Train on booking euthanasia and caring for grieving owners	Week 1		
	First month			
☐	Practise a difficult call with the practice manager	Month 1		
☐	Hold a 30-day check-in	Month 1		

Completed by _____ Checked by (manager) _____ Date _____ Notes _____