

Standard Operating Procedure (SOP)

Outpatient Medical Appointments - Initiating

Objective

The Outpatient Veterinary Technician is the first point of medical contact during outpatient visits. This technician is responsible for greeting patients, collecting comprehensive histories, performing initial assessments, initiating the SOAP (Subjective, Objective, Assessment, Plan) in the medical record, and supporting the veterinarian through sample collection, diagnostics, and treatment plan implementation. This role is critical in maintaining workflow efficiency and ensuring exceptional client and patient care.

Scope

This SOP applies to members of the Outpatient Medical Team who assist in initiating outpatient appointments.

Responsibilities

- Client Service Team: Greet clients and patients upon arrival, follow SOPs to place client/patient into appropriate exam rooms or direct to appropriate waiting area.
- Veterinary Technicians and Assistants: Greet client and patients and initiates SOAP, Charges, and Plan to move the appointment forward.
- Hospital Manager: Ensure staff are trained and the SOP is followed.

Procedure

Client & Patient Intake

- CSR - Greet clients and patients in a friendly, professional manner as they enter the hospital.
- Confirm patient identity and update patient information in the system. Confirm all client information.
- CSR - Escort canine patients >20lbs to scale and collect an accurate weight before escorting to the appropriate exam room. Escort felines or canine patients <20lbs to appropriate exam rooms. patient to exam room promptly and ensure a calm, safe environment.

Medical History Collection

- Collect a thorough and accurate history, including chief complaint, duration, symptoms, medications, diet, vaccine status, and lifestyle factors.
- Document history in the medical record under the Subjective section of the SOAP.

Vital Signs & Technician Examination

- Obtain full TPR (Temperature, Pulse, Respiratory Rate), weight, and pain score.
- Perform a technician-level physical assessment (e.g., mucous membrane color, hydration, BCS, general attitude, mobility head-to-tail physical assessment).
- Record findings under the Objective section of the SOAP.

Plan Development & Diagnostics

- Assist in developing a preliminary plan (labs, imaging, treatments) based on hospital protocols and vet input.
- Draw and process lab samples (blood, urine, feces, skin, etc.) according to protocols. Hand off to back-up/lab tech.



Medical Recordkeeping

- Initiate and complete the Subjective, Objective, and Plan sections of the SOAP note.
- Ensure legibility, accuracy, and timeliness of all entries.

Client Communication & Education

- Review the technician portion of the exam findings with the client.
- Discuss the proposed diagnostic or treatment plan as directed by the veterinarian.
- Answer basic client questions and escalate clinical concerns to the veterinarian.

Charge Entry & Administrative Duties

- Accurately enter all procedures, diagnostics, medications, and services into the PMS for billing.
- Maintain clean, stocked exam rooms and ensure proper patient flow.

Required Skills & Qualifications:

- Credentialed Veterinary Technician (CVT, RVT, or LVT) preferred; experience considered in lieu of certification depending on state law.
- Minimum 1–2 years of experience in a clinical veterinary setting.
- Proficiency in animal handling, restraint, sample collection, and vital sign assessment.
- Excellent written and verbal communication skills.
- Experience with veterinary software (e.g., Cornerstone, Avimark, eVet, etc.) preferred.
- Strong attention to detail and ability to multitask in a fast-paced environment.

Physical Requirements:

- Ability to lift patients or equipment up to 50 lbs.
- Standing, walking, bending, and lifting throughout most of the shift.
- Exposure to animals, allergens, disinfectants, and bodily fluids.

Notes

- Always be polite, personable, and welcoming with all clients and patients. This is a requirement. Work with a smile.
- Offer bottled water when exiting room.

Quality Assurance

- Regular review and role-play during staff meetings.
 - Feedback collected from clients through surveys or reviews.
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