

Standard Operating Procedure (SOP)

Outpatient Medical Appointments - Dr Tech/Assist

Objective

The Veterinarian's Technician supports the veterinarian throughout appointments by ensuring low-stress patient handling, accurate and timely documentation, and high-level client communication. This technician is responsible for managing the appointment flow, performing diagnostics, dispensing medications, and thoroughly reviewing the treatment plan with the client before discharge. Their role is essential in providing an efficient, educational, and compassionate experience for both clients and patients.

Scope

This SOP applies to members of the Outpatient Medical Team who assist the veterinarian with physical exams and client/patient care.

Responsibilities

Introduction

- Greet the clients by introducing yourself and your title. Greet patients on their level and establish and connection with them.

Veterinary Appointment Support

- Remain in the room with the veterinarian during the appointment unless instructed otherwise.
- Provide calm, confident, and least-stress possible restraint appropriate to each patient.
- Anticipate veterinarian needs during exams (e.g., gathering tools, opening lab tests, noting findings).
- Maintain professional composure, empathy, and support for both patient and client.

Medical Recordkeeping

- Accurately document in the SOAP format:
 - Subjective – Client observations and concerns; Medical history; Current medications/preventatives; Current Diet
 - Objective – Exam findings and diagnostic data
 - Assessment – Transcribe veterinarian's assessment
 - Plan – Include all diagnostics, treatments, recommendations. and follow-ups discussed
 - Ensure records are clear, complete, and entered in real-time whenever possible.

Diagnostics & Technical Procedures

- Perform or assist with diagnostics including blood draws, urine collection, cytology, radiographs, and more that were not ordered until veterinarian's exam.
- Prepare and run in-house lab tests or send-out samples per protocol (if lab tech unavailable)
- Assist with treatments, injections, or procedures as needed.

Medication Dispensing & Review

- Accurately fill and label prescribed medications.
- Review all medications, diagnostics, home care instructions, and the treatment plan with the client. Ensuring full understanding and satisfaction.

- Answer basic client questions and ensure they understand when and how to administer care.
- Escalate medical questions to the veterinarian as appropriate.

Client Communication & Care

- Provide compassionate and clear communication throughout the appointment.
- Act as a liaison between the veterinarian and client to reinforce treatment plans and recommendations.
- Help clients feel informed, supported, and valued.

Appointment Wrap-Up

- Review the invoice and ensure all charges are entered accurately/fully..
- Confirm any follow-up needs (e.g., rechecks, diagnostics, refills).
- Ensure invoice notes are entered to assist CSRs with future scheduling, etc.
- Mark the patient as “ready to go” in the system.
- Escort client and patient out and say goodbye professionally and warmly.
- Ensure exam room is cleaned and reset for the next appointment.

Required Skills & Qualifications

- Credentialed Veterinary Technician (CVT, RVT, or LVT) preferred; or equivalent experience as permitted by state regulations.
- Minimum 1–2 years in clinical practice preferred.
- Strong skills in low-stress animal handling and patient restraint.
- Excellent written and verbal communication skills.
- Familiarity with SOAP medical record structure and veterinary terminology.
- Proficient in common diagnostics and technical skills (blood draws, lab tests, radiology, etc.).
- Experience using veterinary practice management software (e.g., Cornerstone, eVet, etc.).

Physical Requirements

- Ability to lift up to 50 lbs. unassisted.
- Frequent standing, bending, kneeling, and animal handling.
- Exposure to animals, zoonotic diseases, cleaning agents, and bodily fluids.

Quality Assurance

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