

Standard Operating Procedure (SOP)

Client Check-Out Procedure

Objective

To ensure that all client check-outs are handled professionally, efficiently, and with warmth - leaving a positive final impression and reinforcing client satisfaction.

Scope

This procedure applies to all front desk and client service team members responsible for processing client check-outs at the veterinary hospital.

Responsibilities

- CSRs: Responsible for completing check-out processes with professionalism and care.
 - Veterinary Staff: Communicate client is ready to be checked out by changing patient status on daily schedule - only after all charges are entered and confirmed. Enter any "invoice notes" for CSRs to acknowledge during the checkout process.
 - Hospital Manager: Provide training and monitor performance.
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Procedure (outpatient)

Warmly Acknowledge the Client

- Greet the client with a smile as they approach the desk: "Alright, how did everything go today with Ben?"
- Use the client and pet's names whenever possible.

Review and Confirm Services

- Confirm the services provided during the visit: "It looks like Ben received his exam, three vaccinations, a heartworm test, and is going home with 6 months of heartworm and flea/tick prevention, does that sound right?"
- Go over the invoice clearly and professionally and then relay the final total: "It looks like that comes to '\$x' today."
- Check for invoice notes and follow through directives (schedule recheck, etc).

Handle Payment Professionally

- Ask the preferred method of payment: "How would you like to take care of that today - cash or card." Confirm card type to properly enter payment information.

Process the transaction and inform the client you will email over the receipt.

Review Medications, Discharge Instructions, or Follow-Ups (as may be listed in an invoice note)

- Go over any follow-up appointments: "It looks like we'll need to see Ben again in two weeks - would you like to schedule that now?"

Offer Final Assistance

- Ask if they need anything else: "Is there anything else I can help you with today?"

ALWAYS Offer to help carry items or assist with the door if needed, especially for elderly clients or those with large pets or carriers.

Warm Goodbye

- End with a warm farewell using names:
"Thank you so much, [Client Name]. Give [Pet's Name] some extra cuddles from us!"
 - Smile and make eye contact as they leave.
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Procedure (surgery)

Warmly Acknowledge the Client

- Follow the Greeting standards of practice.
- Use the client and pet's names whenever possible.

Review and Confirm Services

- Once it has been established that the client is picking up a patient from surgery, Confirm the services provided during the visit: "It looks like Ben was neutered today, had some pre-operative blood work, an IV catheter, received his Rabies vaccination and microchip, and his nails were clipped, does that sound right?"
- Go over the invoice clearly and professionally and then relay the final total: "It looks like that comes to '\$x' today."
- Check for invoice notes and follow through directives (schedule recheck, etc).

Handle Payment Professionally

- Ask the preferred method of payment: "How would you like to take care of that today - cash or card." Confirm card type to properly enter payment information.
- Process the transaction and inform the client you will email over the receipt.

Review Medications, Discharge Instructions, or Follow-Ups (as may be listed in an invoice note)

- Go over any follow-up appointments: "It looks like we'll need to see Ben again in two weeks - would you like to schedule that now?"
- Place the patient's on the "go-home" list in the order they arrive. Include name, type of patient (canine/feline), and client description on "go-home list" for discharge team.
- Instruct clients to have a seat and a team member will be with them momentarily.
 - Whenever possible, CSRs should be engaging with their clients who are waiting. Discuss the day, their pets, etc. Client should never be sitting waiting while CSRs are just chatting to one another or disengaged with them or other clients.

Offer Final Assistance

- Ask if they need anything else: "Is there anything else I can help you with today?"

ALWAYS Offer to help carry items or assist with the door if needed, especially for elderly clients or those with large pets or carriers.

Warm Goodbye

- End with a warm farewell using names:
"Thank you so much, [Client Name]. Give [Pet's Name] some extra cuddles from us!"
- Smile and make eye contact as they leave.

Notes

- Always use calm, kind, and respectful language - even if the client is stressed or upset.
- If there are any concerns or complaints, calmly refer the client to the manager or designated team member. Avoid confrontation, arguments, or negative tones. Always refer to the next level of leadership if unable to manage or resolve the situation.

Quality Assurance

- Periodic observation and client feedback.
 - Role-play check-out scenarios in team training.
 - Regular staff coaching to maintain consistency and warmth
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This template provides clarity on the check-out procedure expectations, emphasizing the importance of maintaining a high standard of customer and patient care.