

TECHNICIAN/ASSISTANT ON-BOARDING CHECKLIST

Employee Name: _____

(Supervisor, trainer, or team lead to initial upon each completion)

Hospital operations

- _____ Locate the SDS for common chemicals
- _____ Know location of drugs and supplies for emergencies
- _____ Know how to access team meeting summaries
- _____ Know medication refill protocols
- _____ Learn how to prepare and label medications for dispensing
- _____ Learn how to fill out paperwork to request lab tests
- _____ Learn how to check/print/log/alert doctors about lab results
- _____ Learn exam room protocols

Learn how to use Practice Information Management Software (PIMS):

- _____ Enter a new client
- _____ Enter a new patient
- _____ Make an appointment
- _____ Learn appointment protocols
- _____ Enter information into physical exam sheet or medical plan/synopsis
- _____ Enter/update patient reminders
- _____ Record a client phone call conversation or message

Learn process for patient admission to hospital

- _____ Review medical record to confirm client and patient information
- _____ Ask appropriate questions and confirm services due
- _____ Make sure check in form signed (anesthesia/client treatment form)
- _____ Get a current weight for patient
- _____ Set up patient identification (e.g. cage card, collar tag)
- _____ Enter patient on the whiteboard/initiate a medical plan/enter medical notes
- _____ Communicating relevant information to co-workers
- _____ Alerting doctor about patient and client needs

Client Communications

- _____ Learn puppy/kitten vaccination and testing protocols
- _____ Learn canine/feline adult vaccination and testing protocols
- _____ Know features and benefits of heartworm, flea/tick products
- _____ Learn hospital standards for how to properly answer phone and greet clients
- _____ Know and understand usage of hospital app and digital client communications
- _____ Know common medical abbreviations
- _____ Understand basic medical terminology

