

IMPLEMENTING THE GUIDELINES PRACTICE ACTION PLAN



The **Implementing the Guidelines: Practice Action Plan** workbook is designed to help you put a personalized plan in place for your team as you prioritize preventive pet healthcare and strengthen your client relationships.

The plan allows you to keep a written record of your practice's core values, the strengths of the team, and the roles and responsibilities of each team member in implementing the **AAHA-AVMA Canine and Feline Preventive Healthcare Guidelines**. A goal-setting template has also been included to manage your team's goals and focus their efforts on achieving success.

We recommend using this **Practice Action Plan** in conjunction with the **Implementing the Guidelines: Team Meeting Guide**, also available from the Partners for Healthy Pets website. You will see references to this meeting guide in this document.

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PRACTICE NAME: PRACTICE ACTION PLAN

Date:

SECTION 1: DEFINING OUR CORE VALUES AS A TEAM

Use Section 1 of the **Practice Action Plan** as you plan for Meeting #2 in the **Implementing the Guidelines: Team Meeting Guide**.

Defining our core values helps to create a guide for decision making and problem solving. Core values can also provide a source of encouragement by reminding you WHY you have chosen a certain path. Taking a moment to talk through collective core values with the team can build a common purpose.

Think about...

- **WHY** you chose the veterinary field.
- The parts of your job that give you a sense of accomplishment. **WHY** do they make you feel that way?
- Your beliefs about preventive pet healthcare. **WHY** are they important?

As a veterinary team, our core values are:

Example: *We would rather keep pets healthy than treat preventable diseases.*

SECTION 2: PREVENTIVE PET HEALTHCARE

Use Section 2 of the **Practice Action Plan** as you plan for Meeting #2 in the **Implementing the Guidelines: Team Meeting Guide**.

In making preventive pet healthcare a priority, veterinary teams need to know what preventive care actions they do well. They also need to know what actions they need to work on. Recognizing a team's strengths and limitations will help them focus their efforts while implementing the Guidelines.

Three preventive care practices that we do well are:

Example: *We always try to schedule the next preventive healthcare visit before the client leaves the clinic.*

1.

2.

3.

Three preventive care practices that we need to work on are:

Example: We need to do a better job of explaining the importance of flea control to our clients.

1.

2.

3.

SECTION 3: CLIENT RELATIONSHIPS

Use Section 3 of the Practice Action Plan as you plan for Meeting #2 in the **Implementing the Guidelines: Team Meeting Guide**.

Client relationships are an essential part of preventive pet healthcare. Veterinary teams need to know what client relationship-building actions they do well and those that they need to work on. Recognizing a team's strengths and limitations will help them focus their efforts while implementing the Guidelines.

Three client relationship-building actions that we do well in our practice are:

Example: We praise our clients when they succeed at helping their pets lose weight.

1.

2.

3.

Three client relationship-building actions that we need to work on are:

Example: We need to do a better job of responding to our clients when they become frustrated with a preventive care recommendation.

1.

2.

3.

SECTION 4: OUR PROTOCOL FOR IMPLEMENTING THE AAHA-AVMA GUIDELINES

Use Section 4 of the **Practice Action Plan** as you plan for Meetings #2 and #3 in the **Implementing the Guidelines: Team Meeting Guide**.

This is a plan for “who will do what when” so that the AAHA-AVMA Canine and Feline Preventive Healthcare Guidelines are consistently applied for all of our patients. We want to ensure that our entire healthcare team is on the same page regarding their role in using the Guidelines and their part in communicating with clients.

CANINE PREVENTIVE HEALTHCARE GUIDELINES

FREQUENCY OF VISITS

How will we ensure that every cat comes to see us at least once a year? Describe each team member’s role in discussing, scheduling, and reminding clients about annual appointments.

Examples

Veterinarians: *Begin the emphasis by telling the client, “See you next year!”*

Veterinary Technicians: *Emphasize the same message as the vet, and ensure that all of the client’s questions have been addressed.*

Receptionists: *Schedule next year’s appointment before the client leaves, and set a reminder for the client in your files.*

Veterinarians

Veterinary Technicians

Receptionists

PATIENT RECORD REVIEW

How will we review patient records at annual appointments? Describe each team member's roles and responsibilities for reviewing patient records.

Examples

Veterinarians: Confirm that the record has been completely reviewed by the receptionist and technician for scheduled preventive care.

Veterinary Technicians: Review the record for refills and necessary vaccinations.

Receptionists: Review the record before the appointment, and note any preventive healthcare services that are due. Ask the client to note any issues or questions he or she has about the pet; include this in the patient's file.

Veterinarians

Veterinary Technicians

Receptionists

HEALTH EVALUATION

Who will complete the annual health evaluation for canine patients? This evaluation includes subjective (history), objective (physical exam), and assessment portions. Are there ways that team members will assist? Be specific, and list responsibilities.

Examples

Veterinarians: Take a complete medical history based on client input, previous history, and complete systematic physical examination.

Veterinary Technicians: Take a history, and determine the client's primary concern for his or her pet.

Receptionists: Ask the client if the pet is currently on any preventives or other medications; offer to refill prescriptions.

Veterinarians

Veterinary Technicians

Receptionists

PHYSICAL EXAM

Who will complete the physical exam for canine patients? This evaluation includes subjective (history), objective (physical exam), and assessment portions. Are there ways that team members will assist? Be specific, and list responsibilities.

Examples

Veterinarians: Conduct a complete system-by-system physical exam, and at each step, discuss the findings and health implications for the pet with the client.

Veterinary Technicians: Take the pet's weight and body temperature; record both in the patient record.

Receptionists: At the time the appointment is made, remind the pet owner that the veterinarian will complete a physical examination.

Veterinarians

Veterinary Technicians

Receptionists

DIAGNOSTIC, THERAPEUTIC, AND PREVENTION PLAN

Who will complete the diagnostic, therapeutic, and prevention plan for canine patients? Who will establish the customized plan and educate clients about it? Be specific, and list responsibilities. Note that diagnosing and prescribing should be consistent with applicable licensing requirements for veterinarians and veterinary technicians.

Examples

Veterinarians: Order serum and urine tests; interpret the results, and report them to the client.

Veterinary Technicians: Draw a blood sample for heartworm testing, and perform analysis.

Receptionists: Collect the dog's fecal sample from the client, and deliver it to the lab for parasite analysis.

Veterinarians

Veterinary Technicians

Receptionists

FOLLOW-UP PLAN AND DOCUMENTATION

Who will establish a follow-up plan for canine patients? Who will set expectations for the next visit? Who will communicate the plan and expectations to the client? Who is responsible for thoroughly documenting the patient visit? Be specific, and list responsibilities.

Examples

Veterinarians: Establish a follow-up plan for preventive care, and communicate it to the client.

Veterinary Technicians: Answer any client questions about the veterinarian's recommendations; offer client handouts.

Receptionists: Check whether any follow-up phone calls are required, and put a reminder in the patient's file.

Veterinarians

Veterinary Technicians

Receptionists

FELINE PREVENTIVE HEALTHCARE GUIDELINES

FREQUENCY OF VISITS

How will we ensure that every cat comes to see us at least once a year? Describe each team member's role in discussing, scheduling, and reminding clients about annual appointments.

Examples

Veterinarians: Begin the emphasis by telling the client, "See you next year!"

Veterinary Technicians: Emphasize the same message as the vet, and ensure that all of the client's questions have been addressed.

Receptionists: Schedule next year's appointment before the client leaves, and set a reminder for the client in your files.

Veterinarians

Veterinary Technicians

Receptionists

PATIENT RECORD REVIEW

How will we review patient records at annual appointments? Describe each team member's roles and responsibilities for reviewing patient records.

Examples

Veterinarians: Confirm that the record has been completely reviewed by the receptionist and technician for scheduled preventive care.

Veterinary Technicians: Review the record for refills and necessary vaccinations.

Receptionists: Review the record before the appointment, and note any preventive healthcare services that are due. Ask the client to note any issues or questions he or she has about the pet; include this in the patient's file.

Veterinarians

Veterinary Technicians

Receptionists

HEALTH EVALUATION

Who will complete the annual health evaluation for feline patients? This evaluation includes subjective (history), objective (physical exam), and assessment portions. Are there ways that team members will assist? Be specific, and list responsibilities.

Examples

Veterinarians: Take a complete medical history based on client input, previous history, and complete systematic physical examination.

Veterinary Technicians: Take a history, and determine the client's primary concern for his or her pet.

Receptionists: Ask the client if the pet is currently on any preventives or other medications; offer to refill prescriptions.

Veterinarians

Veterinary Technicians

Receptionists

PHYSICAL EXAM

Who will complete the physical exam for feline patients? This evaluation includes subjective (history), objective (physical exam), and assessment portions. Are there ways that team members will assist? Be specific, and list responsibilities.

Examples

Veterinarians: Conduct a complete system-by-system physical exam, and at each step, discuss the findings and health implications for the pet with the client.

Veterinary Technicians: Take the pet's weight and body temperature; record both in the patient record.

Receptionists: At the time the appointment is made, remind the pet owner that the veterinarian will complete a physical examination.

Veterinarians

Veterinary Technicians

Receptionists

DIAGNOSTIC, THERAPEUTIC, AND PREVENTION PLAN

Who will complete the diagnostic, therapeutic, and prevention plan for feline patients? Who will establish the customized plan and educate clients about it? Be specific, and list responsibilities. Note that diagnosing and prescribing should be consistent with applicable licensing requirements for veterinarians and veterinary technicians.

Examples

Veterinarians: Order serum and urine tests; interpret the results, and report them to the client.

Veterinary Technicians: Draw a blood sample for heartworm testing, and perform analysis.

Receptionists: Collect the cat's fecal sample from the client, and deliver it to the lab for parasite analysis.

Veterinarians

Veterinary Technicians

Receptionists

FOLLOW-UP PLAN AND DOCUMENTATION

Who will establish a follow-up plan for feline patients? Who will set expectations for the next visit? Who will communicate the plan and expectations to the client? Who is responsible for thoroughly documenting the patient visit? Be specific, and list responsibilities.

Examples

Veterinarians: Establish a follow-up plan for preventive care, and communicate it to the client.

Veterinary Technicians: Answer any client questions about the veterinarian's recommendations; offer client handouts.

Receptionists: Check whether any follow-up phone calls are required, and put a reminder in the patient's file.

Veterinarians

Veterinary Technicians

Receptionists

SECTION 5: SETTING GOALS

Use Section 5 of the **Practice Action Plan** as you plan for Meetings #5 in the **Implementing the Guidelines: Team Meeting Guide**.

Setting goals for a team will help ensure that everyone is aware of what is trying to be achieved and their expected contribution in the final outcome. Goals should be simple yet specific, and achievable in a reasonable amount of time with measurable outcomes. Use the following template to manage your team goals. Print and complete a copy for each goal.

GOAL

Example: All team members will feel more comfortable talking to clients and answering questions about pet nutrition and healthy pet body weights.

Actions for Achievement	Person Responsible	Due Date	Expected Challenges	Desired Outcomes
<i>Example: Organize a presentation of all the nutritional products sold in the clinic.</i>	<i>Jen (receptionist); Marie (technician)</i>	<i>September 2012</i>	<i>Keeping everyone up-to-date on the newest products available for sale in the clinic</i>	<i>Increase in sales of nutritional products as a result of better client communication and medically appropriate dietary recommendations</i>

Comments

Date of Completion
