

**Learner Unit Achievement Checklist**

**SEG Awards Level 3 Certificate for Veterinary Receptionists**

**610/3461/7**

###### SEG Awards Level 3 Certificate for Veterinary Receptionists

## Centre Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Learner Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Notes to learners – this checklist is to be completed, to show that you have met all the mandatory and required optional units for the qualification.

**J/650/9173 Concepts of Customer Service - Mandatory Unit**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Identify the significance and positive impacts of valuable communication when working in customer service  **1.2** Identify provision for customers with specific needs and demonstrate how to sensitively communicate when dealing with customers  **1.3** Define the different roles within a veterinary practice team and record their responsibilities within the practice  **1.4** Analyse the difference in professional communication approaches, and when these will be of best use, including:   * In Person * Telephone Call (controlling multiple telephones) * Electronic sources including social platforms * Written Message   **1.5** Provide an explanation of the importance of achieving service standards within a professional and organised manner  **1.6** Explain how to liaise successfully both internally with colleagues and externally with customers, to promote positive relationships at all times |  |  |  |  |
| **2.1** Identify the signs that indicates a situation is challenging  **2.2** Actively listen to others to establish the nature of the challenging situation  **2.3** Demonstrate a range of techniques to manage the challenges identified and how they will be escalated within the lines of authority |  |  |  |  |
| **3.1** Outline and distinguish the different types of appointments that can be offered within veterinary care and how to identify their priority  **3.2** Explain the process of how to create an appointment and how to make a referral confirming with the client once done  **3.3** Summarise the essential details concerning the animal which need to be logged when booking an appointment such as the client, the pet and the reason for the appointment |  |  |  |  |
| **4.1** Explain the different types of payments which can be used when paying for a veterinary service  **4.2** Give an explanation of the importance of instant payment  **4.3** Assess the benefits and restrictions of payment plans that a number of veterinary practices provide  **4.4** Summarise the plan of action for incomplete payments and the impact this has on the Practice |  |  |  |  |
| **5.1** Explain the different types of veterinary insurance schemes that are accessible along with outlining their purpose  **5.2** Investigate the wide range of insurance policies that are on offer  **5.3** Explain the legal restrictions that are attached to insurance guidelines  **5.4** Describe the phrase excess in connection to an insurance declaration  **5.5** Identify the advantages and disadvantages of indirect and direct insurance claims, and when these are of best use |  |  |  |  |
| **6.1** Explain the different types of animal health care plans available and when each would be most effective  **6.2** Explain the purpose of an animal health care plan and its purpose  **6.3** Explain what contribution a Veterinary Receptionist has in encouraging an animal health plan whilst maintaining positive customer relations |  |  |  |  |
| **7.1** Outline the significance and positive ramifications of resolving a complaint with consideration to veterinary best practice to enhance your own knowledge  **7.2** Explain the different types of approaches to solving a customer complaint  **7.3** List the different reasons as to why a complaint situation may escalate and the impact of this happening  **7.4** Define how customer expectations can differ with consideration to the following points: Private client / customer with consideration to age, culture and social profile Commercial customer  **7.5** Distinguish the different customer types with consideration to sensitive situations that may drive behaviours |  |  |  |  |
| **8.1** In the wake of a pet bereavement, consider the five steps of grief  **8.2** Explain the importance of empathy when communicating with a grieving client  **8.3** Describe the definition of euthanasia, the different options available and situations where this may arise  **8.4** Explain the different arrangements for disposing of cadavers |  |  |  |  |

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**K/650/9174 Veterinary Receptionist Administrative Responsibilities - Mandatory Unit**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Describe the process of registering new clients and how to control their records  **1.2** Describe the significance of precise keeping of customer records  **1.3** Explain how to control and order bookings effectively and keep effective diary management of the veterinary team  **1.4** Describe the codes of practice and legislative needs with regards to handling data, with exact reference to ‘Code of Professional Conduct of Veterinary Nurses – Professionals  **1.5** Describe the methods of disclosing pet and client information out of the establishment and what key factors have to be considered |  |  |  |  |
| **2.1** Explain how to assemble and issue information with consideration to be given to the different customer type, the specific needs of customers and the suitable form of communication  **2.2** Describe the handling of sending information out to clients for upcoming appointments and the different effective methods to do this with consideration to the customer type and any specific need identified |  |  |  |  |
| **3.1** Provide an overview of The Data Protection Act 2018 and its importance  **3.2** Explain how to register and record insurance claims  **3.3** Describe the purpose of implementing and administering consent forms  **3.4** Explain the significance of using accurate abbreviations and terminology |  |  |  |  |

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**L/650/9175 Veterinary Products - Mandatory Unit**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Assess the range of individual food types, and establish why it is important to ensure an animal has a suitable diet for their life stage and health  **1.2** Provide examples of issues that could occur if animal nutrition is not present, including injury and illnesses  **1.3** Describe nutritional alterations necessary for the following circumstances:   * Long term health conditions such as Diabetes * Short term health conditions such as post – surgery and abdominal upset Dental care |  |  |  |  |
| **2.1** Explain the different parasites that can be established in animals  **2.2** Explain the cycle of life for familiar ectoparasites  **2.3** Describe the care required to prevent infestation of parasites  **2.4** Describe the different approaches for administrative routes of medication, to include:   * Spot on * Sprays * Tablets   **2.5** Explain the requirement to give treatment in home environments to stop the spread of parasite infestations |  |  |  |  |
| **3.1** Describe the most commonly used health care products for everyday well-being  **3.2** Describe the range of products available to improve good dental hygiene  **3.3** Describe the range of pheromone products, when they are to be used and their benefits |  |  |  |  |
| **4.1** Outline the legal limitations of Veterinary Receptionist and provide examples of when is appropriate to seek the advice of a qualified Veterinary Nurse or Surgeon  **4.2** Outline what is meant by the term ’AVM\_GSL’ and provide a list of drugs sold as this  **4.3** Explain the following legal types of medication:   * SAES * NFA-VPS * POM-V * AVM-GSL * POM-VPS   **4.4** Describe the following acts and their purpose:   * Misuse of Drugs Act of 1971 * Veterinary Surgeons Act of 1966 * Veterinary Medicines Regulations 2013 |  |  |  |  |
| **5.1** Describe ways to promote products to clients  **5.2** Describe the process of alternating stock to make sure of minimum waste  **5.3** Describe suitable systems of storing several types of stock  **5.4** Describe how to take stock and order accurately from suppliers to maintain a sustainable level |  |  |  |  |

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**M/650/9176 Veterinary Terms and Clinical Methods - Mandatory Unit**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Outline the terms frequently used in veterinary anatomy  **1.2** Describe the root words frequently used in a veterinary practice  **1.3** Describe a type of prefixes and suffixes frequently used in veterinary terminology |  |  |  |  |
| **2.1** Evaluate the use of vaccines in different types of animals, exploring both their positive and negative impacts  **2.2** Evaluate the procedure and intent of titre testing  **2.3** Explain the procedure and intent when neutering different types of animals  **2.4** Explain the positives and negatives of neutering different types of animals  **2.5** Describe the different causes of frequent dental procedures for animals  **2.6** Outline the procedure for microchipping animals and discuss the intent for this  **2.7** Explain the additional frequent procedures to be expected in a veterinary practice, such as wing and claw clipping |  |  |  |  |

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**R/650/9177 Veterinary Receptionist Lead - Mandatory Unit**

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| Assessment Criteria | Evidence (Brief description/title) | Portfolio Reference | Date Completed | Comment |
| **1.1** Describe the significance of a clean and organised reception and waiting area  **1.2** Outline the importance of displaying information, advice and guidance on animal care for clients in the waiting and reception area  **1.3** Explain the benefits and disadvantages to using technology within the reception area  **1.4** Outline the hygiene and cleaning policy |  |  |  |  |
| **2.1** Describe the different types of roles and their responsibilities of the veterinary team  **2.2** Identify the most appropriate role within the practice to provide treatment and guidance when making a referral for parasite treatment |  |  |  |  |
| **3.1** Explain the essentials for the role of a Veterinary Receptionist under the Health and Safety Act at Work Act 1974  **3.2** Acknowledge the body of laws involved within notifiable diseases, chemical usage and biosecurity  **3.3** Analyse a selection of PPE required to restrict infection in a veterinary practice  **3.4** Provide a detailed description of ‘zoonosis’ and outline the usual examples |  |  |  |  |
| **4.1** Describe specific actions to take when proceeding towards an animal showing different behaviours such as:   * Aggressive * Nervous * Relaxed * Stressed   **4.2** Provide an explanation on how owners may suitably control their animals within the waiting area  **4.3** Provide an explanation on how Veterinary Receptionists can support owners with distressed animals when waiting for their appointment |  |  |  |  |

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