



Veterinary Practice Management Professional

Job Framework & Job Description



About this Document

This document is authored by the Veterinary Hospital Managers Association (VHMA). It presents the typical job framework for a veterinary practice management professional — in other words, the background for and qualifications of the job — and provides a job description that you can edit, personalize to your practice, print, and sign. The appendix outlines how a veterinary practice management professional can become a Certified Veterinary Practice Manager (CVPM).

The VHMA's commitment to the field of practice management has led it to develop general descriptions of the various levels of management within a veterinary hospital. No two individuals are the same and no two veterinary practices are the same; therefore, it follows that these are very general descriptions and are proposed only as guidelines to assist in identifying the level of knowledge needed by veterinary practices or desired by those pursuing this career.

It is extremely difficult to differentiate the three levels of practice management because each level builds upon the knowledge and skills of the other levels. Therefore, this document presents the three levels simultaneously:

1. Veterinary Hospital Office Manager
2. Veterinary Practice Manager
3. Veterinary Hospital Administrator

Please note that this document was developed and formatted for Word 2019. Although we have done our best to ensure consistent formatting for all versions, other versions of Word may show different formatting than intended.

About the VHMA

The Veterinary Hospital Managers Association was formed in 1981 and, since inception, the association strives to support and advance the profession of veterinary hospital management. The phenomenal growth this association has experienced in such a short time attests to its viability as the leader in veterinary practice management and its definite need by practice management professionals. In 1989, the VHMA developed the CVPM certification, which signifies that a manager possesses a high level of knowledge and competency related to veterinary practice management.

Levels of Practice Management

Veterinary Hospital Office Manager

The veterinary hospital office manager is responsible for seeing that administrative policies and decisions are accomplished. An office manager's realm of authority and decision-making may be very broad or very limited depending on the administrative needs and criteria established.

Generally, the office manager may be responsible for the daily accounting transactions with clients, banks, suppliers, and personnel. Office managers may coordinate scheduling, training, purchasing, and bookkeeping for a veterinary practice. Some office managers may be the liaison between the administrator and support staff personnel.

Veterinary Practice Manager

A veterinary practice manager is charged with the responsibilities of managing the business activities of a veterinary hospital. A practice manager may have extremely different responsibilities and authority depending upon the size of the hospital and the ownership or administrator's delegation. Practice managers have knowledge of all the responsibilities of a veterinary office manager and the ability to further the management of a veterinary hospital by having direct authority and decision-making responsibilities over all business aspects of the veterinary practice.

Veterinary Hospital Administrator

The function of a veterinary hospital administrator is unique from all other positions in a veterinary hospital because the administrator has complete authority over the operation of the business and practice in concert with the practice owner(s) or board of directors. The administrator is the coordinator and final authority of all business functions and the supervising agent of all hospital services and personnel. He/she is responsible for all the functions described for office and practice managers with the additions of being responsible for professional staffing and supervision.

While the administrator may not have the knowledge of a veterinarian regarding medicine, the administrator should have a general knowledge of quality assurance and performance in veterinary medicine and may act in an advisory role in helping establish and supervise medical protocols of the practice.

Typical Tasks & Duties

The table below indicates (1) which of the three levels of veterinary practice management professional typically perform specific tasks or duties and (2) the average number of minutes per week the manager spends on those tasks. These statistics are derived from VHMA's 2019 Report on Compensation and Benefits for Veterinary Managers.

TASKS AND DUTIES	% RESPONSIBLE FOR TASK			AVERAGE MINUTES / WEEK
	Office Manager	Practice Manager	Administrator	
Prepare and perform bank deposits	43%	59%	58%	50
Bookkeeping	47%	55%	63%	60
Accounts payable	53%	64%	75%	60
Accounts receivable	63%	70%	70%	60
Prepare or supervise hospital accounting	43%	64%	78%	60
Prepare hospital budgets	13%	54%	72%	40
Audit company, prepare financial information	20%	50%	60%	50
Schedule staff	67%	73%	66%	60
Mediate personnel issues	80%	80%	86%	110
Conduct staff meetings	67%	79%	83%	60
Manage daily work assignments	77%	78%	75%	120
Serve as liaison to clients concerning complaints	70%	80%	80%	60
Take direct action to deal with complaints	73%	79%	80%	43
Oversee building and equipment maintenance	73%	78%	82%	60
Purchases/supervise supplies purchases	70%	79%	77%	60
Purchasing/supervising equipment purchases	63%	75%	83%	30
Ensure compliance with laws and regulations	63%	80%	85%	60
Manage the practice's marketing plan	37%	72%	81%	60
Manage practice information technology (IT)	43%	73%	75%	60

Detailed Tasks List

The VHMA regularly conducts practice analysis studies to identify the specific responsibilities required of veterinary practice management professionals and the skills and knowledge needed to perform these responsibilities. The detailed task list provided here identifies the most relevant and important duties of the veterinary practice management professional's job.

The VHMA offers a Self-Evaluation Tool derived from this job task list. It is for managers who wish to identify areas of strength and weakness for continued development. Download this free tool from the store on the [VHMA website](#).

Human Resources

The veterinary practice management professional plans, directs, and coordinates the human resource management activities of the organization. These tasks require knowledge of: (1) principles and procedures for recruitment, selection, training, and evaluation of personnel; (2) management principles for strategic planning, leadership, compensation, and scheduling; (3) methods of writing job descriptions and manuals.

TASKS

1. Recruit, interview and hire new employees
2. Manage personnel training and development programs (including safety training)
3. Establish work schedules for staff
4. Manage daily work assignments
5. Conduct staff meetings
6. Conduct employee performance reviews
7. Mediate internal disputes between staff and office personnel
8. Discipline/discharge employees
9. Manage employee benefit programs
10. Maintain confidential employee records
11. Create, review, and update job descriptions/manuals
12. Manage staff continuing education and licensure/certification

Law & Ethics

The veterinary practice management professional monitors the procedures and policies of the practice to determine whether events and processes comply with laws, regulations, or standards. This requires knowledge of state/provincial and federal laws, legal codes, government regulations, professional standards, and agency rules.

TASKS

1. Understand and ensure compliance with appropriate regulatory agencies, including: monitoring hospital violations and dangerous situations; documenting and reporting accidents; filing appropriate reports.
2. Understand the ethical requirements of veterinary practice outlined by the AVMA and VHMA code of ethics, and ensure that staff fulfill their ethical responsibilities
3. Understand and ensure compliance of Contract Law as it pertains to associates, staff, and clients
4. Understand and ensure compliance with Employment/Labor Law
5. Understand and ensure compliance with the legal and ethical guidelines surrounding confidentiality of staff, clients, and patients

Marketing & Client Relations

The veterinary practice management professional plans and coordinates marketing, public relations, and client service programs. This requires knowledge of the principles of target marketing, market research, pricing, and product promotion. It also requires knowledge of the principles and processes for providing customer services, including customer needs assessment and methods for evaluating customer satisfaction.

TASKS

1. Develop and manage internal/external marketing and public relations: promotional items, advertising, website, social media, and community outreach
 - a) Monitor results of marketing efforts
2. Establish client communication protocols and facilitate client retention and satisfaction:
 - a) Monitor client retention
 - b) Develop and manage new client programs
 - c) Handle client complaints
 - d) Obtain/report client feedback on service
 - e) Respond to client questions
 - f) Develop and manage client reminder system
 - g) Manage client education

Organization of Practice

The veterinary practice management professional is responsible for general practice management and establishing data monitoring systems related to veterinary practice. This requires a working knowledge of veterinary terminology, the requirements for common procedures, and preventative health and risk management protocols. It also requires knowledge of inventory systems, medical record standards, and protocols for equipment maintenance and insurance.

TASKS

1. Maintain appropriate inventory system including controlled substance ordering, tracking, security, destruction
2. Coordinate acquisition of and track purchase orders for drugs, uniforms, equipment
3. Assure insurance coverage of hospital and equipment
4. Contract for repair/maintenance of equipment, building, grounds
5. Establish protocols for daily facility maintenance
6. Maintain appropriate medical record system that complies with legal standards
7. Establish policies for use of technology in the practice, including computer networks
8. Act as a liaison between the practice and professional advisors (e.g., accountants, insurance agents, consultants)
9. Maintain protocols for hospital procedures and risk management plans
10. Strategic planning

Financial Management

The veterinary practice management professional analyzes, maintains, and oversees the financial and banking procedures of the practice. In consultation with practice owner, the manager also monitors financial trends and projections and prepares budgets. This requires knowledge of basic principles of financial accounting and forecasting, including balance sheets, profit/loss accounts, financial ratios, and current taxation law.

TASKS

1. Analyze practice and financial reports
2. Manage payroll
3. Manage accounts receivable and accounts payable
4. Prepare budgets and long-range fiscal plans
5. Establish and enforce client credit policies
6. Conduct fee analysis, and monitor and update fee schedules
7. Oversee daily and monthly banking procedures
8. Maintain chart of accounts
9. Maintain imprest petty cash account

Critical Competencies

This critical competency list was derived from a scientific job analysis of veterinary practice management professionals conducted by the VHMA. The detailed analysis identified (1) job duties, (2) the relative importance of the duties, (3) the knowledge, skills and abilities needed to perform the duties, and (4) the competencies most critical for success.

The job of veterinary practice management professional is multi-faceted and requires many different behavioral competencies for success. Thirteen competencies emerge as essential and highly important:

DECISION MAKING

The ability to make good decisions, solve problems, and decide on important matters is a critical. Managers must be able to efficiently gather and analyze relevant data on different issues, evaluate results and choose decisively between alternatives. They must be able to effectively implement their decisions and initiate action.

INTEGRITY

Managers must act with integrity and uphold high standards of ethical conduct in all aspects of the job, including ensuring compliance with laws/regulations/standards, responsibility for financial accounts, oversight of banking, and confidential and sensitive personnel issues. They must adhere to ethical principles and values, and be sincere and trustworthy.

CRITICAL & STRATEGIC THINKING

Strategic thinking and planning are an essential part of financial forecasting, marketing plans, and long-term plans for growth of the practice. Managers must have the ability to identify questions, problems, and arguments relevant to these issues and to use logic and critical reasoning to identify the strengths and weaknesses of alternative solutions or approaches to problems.

PLANNING & PRIORITIZING

The manager has many different job responsibilities, several of which relate to compliance with professional and legal standards and regulations. As a result, managers must be able to organize their work efficiently, set priorities, and establish plans or timetables for achieving goals. They must effectively manage time and work load to meet deadlines.

CRITICAL COMPETENCIES

ORAL COMMUNICATION & COMPREHENSION

Managers must express their thoughts verbally in a clear and understandable manner, and actively listen and attend to what others are saying. They must possess good presentation skills and be comfortable making group presentations. These skills are necessary and essential for interacting and communicating effectively with clients and coworkers, and provide the foundation for effective personnel training and performance management programs.

WRITING & VERBAL SKILLS

Managers are responsible for writing and updating protocols, manuals, and handbooks, and must understand complex technical information related to different aspects of their job. Managers must be able to comprehend written material easily and accurately and be able to express their thoughts clearly and succinctly in writing.

ANALYTICAL SKILLS

Many of the tasks in the financial, personnel and marketing job domains require quantitative reasoning and analytical skills. Managers must have the ability to analyze information quickly and efficiently. They must accurately grasp complex information and concepts and make correct inferences from their analysis of data.

COMPLIANCE

Managers are responsible for office management and compliance with federal, state, and professional regulations. Accordingly, they need to be thorough and conscientious in their approach to work. They must be dependable, show concern for detail and demonstrate appreciation for the importance of organizational rules and policies.

RESOURCEFULNESS

The multi-faceted nature of the job requires managers to be resourceful, to take initiative and figure out how to get a job done. Effective managers understand what it takes to complete the job. They apply knowledge, skills, and expertise to perform tasks quickly and efficiently. They make effective use of resources and technology.

CONTINUOUS LEARNING

Best practices in management and legal issues are constantly evolving and managers must keep up with these changes. They must demonstrate curiosity for learning and actively seek out new information, technologies, and methods. They must also seek feedback and other opportunities for self-development.

CRITICAL COMPETENCIES

RESILIENCE

Veterinary hospitals can be stressful workplaces and managers must cope effectively with pressure and setbacks; obstacles or failure should not deter them. Effective managers handle crisis situations effectively and maintain their composure under stress.

ADAPTABILITY

Veterinary hospitals can also be characterized by a fair amount of uncertainty and unpredictability. Managers must adapt their work behavior in response to changing conditions or new information. They need to be open to change and not bothered by ambiguity.

LEADERSHIP

Leadership is essential for the human resource management tasks of a manager. Effective managers influence and motivate others in the workplace. They take initiative in organizing and coordinating the activities of group members and are successful at mobilizing group effort toward a common goal.

Credentials, Compensation & Benefits

Credentials

According to the VHMA 2019 Report on Compensation and Benefits for Veterinary Managers:

- 43% of office managers surveyed held a degree from a post-secondary institution (university or college), and 23% were credentialed technicians, and 3% held a CVPM.
- 73% of practice managers surveyed held a degree from a post-secondary institution, 24% were credentialed technicians, and 18% held a CVPM.
- 85% of administrators surveyed held a degree from a post-secondary institution, 14% held a post graduate degree, 25% were credentialed technicians, and 35% held a CVPM.

Compensation

According to the VHMA 2019 report, the average salary was:

- \$42,832.00 for office managers — and depending on the practice type, number of hospitals managed, number of staff managed, location, and the office managers credentials and years of experience, their median annual salary varied from approximately \$32,000 to \$54,500.00
- \$56,889.00 for practice managers — and depending on the practice type, number of hospitals managed, number of staff managed, and the practice manager's credentials and years of experience, their median annual salary varied from approximately \$46,000 to \$64,000
- \$77,942.00 for administrators — and depending on the practice type, number of hospitals managed, number of staff managed, and the administrator's credentials and years of experience, their median annual salary varied from approximately \$59,000 to \$91,000

Vacation

According to the VHMA 2019 report, the median vacation time, depending on the number of years of service, ranged from:

- 2 to 3 weeks for office managers
- 2 to 3 weeks for practice managers
- 2 to 3 weeks for administrators

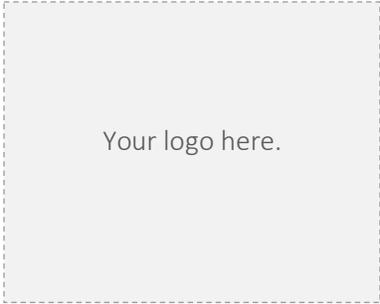
Employee Benefits

According to the VHMA 2019 report, benefits received by office managers, practice managers and administrators varied from practice to practice and may include: continuing education (fees, travel, days off), vehicle allowance (per mile), health and dental insurance, child care, pet insurance, veterinary care and product discounts, dues (voluntary association), license, malpractice insurance, disability insurance, employee pension plan, uniforms, cell phone, and paid time off.

FOR MORE INFORMATION

For more detailed information and statistics, read the VHMA's *2019 Report on Compensation and Benefits for Veterinary Managers* – for a copy, contact the VHMA or visit the VHMA website: www.vhma.org. The report provides detailed salary and benefit information for Office Managers, Practice Managers, and Hospital Administrators. In this report, compensation characteristics are broken down by:

- Credentials
- Tasks and duties
- Type of practice
- Years of experience
- Years at current location
- Number of hospitals
- Number of staff
- Split shifts
- Employment contract
- Job description
- Location

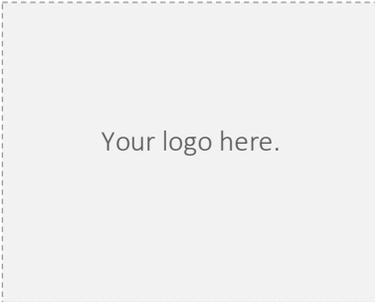


JOB DESCRIPTION

Veterinary Practice Management Professional



About this Practice



ENTER PRACTICE NAME HERE.

Address: Enter practice address here.

Phone: Enter practice phone number here.

Email: Enter practice email here.

Website: Enter practice website here.

Human Resources Contact:

Name: Enter contact name here.

Phone: Enter contact phone number here.

Email: Enter contact email here.

Mission Statement:

Enter practice mission statement here.

Duties Checklist

Practice Name: Enter practice name here.

1. STAFF DEVELOPMENT

Create and maintain staff manual. Include practice philosophy, policies, standards, and job descriptions. Create training protocols and manuals. Maintain reference library of training resources and professional publications. Budget percentage of gross for staff continuing education.

ARE YOU CURRENTLY PERFORMING THIS DUTY?	IF NO, WHEN WILL YOU PERFORM THIS DUTY?
Choose an item. When did you start?	Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

2. STAFF MAINTENANCE

Design employment manual to recruit, interview, hire, train, evaluate, and discharge staff. Plan staff at optimum levels for practice needs, and create master schedules.

ARE YOU CURRENTLY PERFORMING THIS DUTY?	IF NO, WHEN WILL YOU PERFORM THIS DUTY?
Choose an item. When did you start?	Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

3. STAFF COMPUTER TRAINING

Train staff to use computer software to its fullest capabilities. Implement or update the software, and maintain the smooth working of the system. Create paperwork to compliment the software. Back up system daily, and store backups safely.

ARE YOU CURRENTLY PERFORMING THIS DUTY?	IF NO, WHEN WILL YOU PERFORM THIS DUTY?
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DUTIES CHECKLIST

Choose an item.	When did you start?	Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.		

4. STAFF COMMUNICATION

Plan and schedule regular staff meetings which are structured with an agenda. Hold full staff and area meetings. Maintain minutes of meetings and/or create an in-house newsletter.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

5. STAFF INTERACTION

Develop a practice Code of Ethics. Establish standards of behavior and protocols to resolve interpersonal conflict. Mediate, if necessary, and follow through with disciplinary action.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

6. STAFF RECORDS

Maintain staff records in a locked file for confidential individual staff files which include such items as federal and state/provincial forms, medical records, warnings, timecards, pay rate and raises, and evaluations. Know applicable labor laws and regulations.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS:	

DUTIES CHECKLIST

Click or tap here to enter text.

7. STAFF SAFETY

Establish and maintain a safety manual in compliance with OSHA and EPA (U.S.) or WYMIS (Canada). Develop fire, accident, and injury protocols, and develop a maternity and disability policy. Create an ongoing safety and training program.

ARE YOU CURRENTLY PERFORMING THIS DUTY?	IF NO, WHEN WILL YOU PERFORM THIS DUTY?
Choose an item. When did you start?	Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

8. STAFF BENEFITS

Design staff benefit plan such as: insurance, personal time, vacation time, and retirement plan. Develop staff personal pet-care protocol. Maintain records of and make timely payments for the benefits.

ARE YOU CURRENTLY PERFORMING THIS DUTY?	IF NO, WHEN WILL YOU PERFORM THIS DUTY?
Choose an item. When did you start?	Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

9. STAFF PAYROLL

Compute hours or salaries and benefits, maintain adequate bank balance for payroll, and make timely payment of required payroll taxes and insurance. File payroll reports in a timely manner. Post labor law regulations.

ARE YOU CURRENTLY PERFORMING THIS DUTY?	IF NO, WHEN WILL YOU PERFORM THIS DUTY?
Choose an item. When did you start?	Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

DUTIES CHECKLIST

10. ACCOUNTS RECEIVABLE

Develop protocols for receiving client monies. Limit number of cashiers; number receipts; and provide safe for undeposited monies, cash drawer, and petty cash. Have protocol for exchanges, client refunds, and client credits. Create estimates and payment plans. Divide responsibilities among staff.

ARE YOU CURRENTLY PERFORMING THIS DUTY?	IF NO, WHEN WILL YOU PERFORM THIS DUTY?
Choose an item. When did you start?	Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

11. INCOME RECONCILIATION

Reconcile daily receipts to the daysheets or computer income reports. Make daily deposits and reconcile imprest petty cash account. Review monthly accounts receivable reports.

ARE YOU CURRENTLY PERFORMING THIS DUTY?	IF NO, WHEN WILL YOU PERFORM THIS DUTY?
Choose an item. When did you start?	Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

12. CREDIT POLICIES

Set and/or enforce established credit policies, maintain accounts receivable, send monthly statements, and maintain protocols for collection of overdue accounts and bad checks. Track collection and bad debt expense.

ARE YOU CURRENTLY PERFORMING THIS DUTY?	IF NO, WHEN WILL YOU PERFORM THIS DUTY?
Choose an item. When did you start?	Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

13. ACCOUNTS PAYABLE

DUTIES CHECKLIST

Verify accuracy of invoices, make timely payments of reconciled statements, pay all business taxes and licenses, reconcile monthly bank statements, and maintain cash flow.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

14. INVENTORY

Maintain diet, OTC products, hospital, and office inventory at optimum levels. Cost compare and set fees for inventory items. Properly store and safeguard inventory. Complete a physical inventory at least annually.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

15. FINANCIAL REPORTING

Maintain Accounts Payable, Accounts Receivable, and General Ledger records either manually or in the computer. Produce monthly Balance Sheet, Income Statement (Profit and Loss), and Management Statement. Maintain DVM production reports.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

16. BUDGETING

Prepare a written budget, including projection for income and expense based on past financial reports. Include future projections for staff and planned capital expenditures for equipment or facility. Advise owners monthly if the practice is within budget projections for growth of gross and net.

DUTIES CHECKLIST

ARE YOU CURRENTLY PERFORMING THIS DUTY?	IF NO, WHEN WILL YOU PERFORM THIS DUTY?
Choose an item. When did you start?	Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

17. PURCHASING

Plan major purchases of equipment by researching the product and providing financial and projected use data to make informed decisions. Use acceptable financial formulas.

ARE YOU CURRENTLY PERFORMING THIS DUTY?	IF NO, WHEN WILL YOU PERFORM THIS DUTY?
Choose an item. When did you start?	Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

18. FEE SETTING

Determine appropriate fee schedule from data in practice financial reports. Create tracking forms to make fees consistent, to capture all fees for services, and to monitor staff compliance.

ARE YOU CURRENTLY PERFORMING THIS DUTY?	IF NO, WHEN WILL YOU PERFORM THIS DUTY?
Choose an item. When did you start?	Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

19. PATIENT MEDICAL RECORDS

Oversee a legally-defensible patient medical record system which includes an accepted veterinary medical record format, regular review of records for accuracy, completeness, and compliance (client education; informed consent, refusal of treatment plans, estimates, and phone conversations), and purging schedules. Keep records for the required time. Release copies of records at the client's request. Maintain a safe storage system.

ARE YOU CURRENTLY PERFORMING THIS DUTY?	IF NO, WHEN WILL YOU PERFORM THIS DUTY?
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DUTIES CHECKLIST

Choose an item.	When did you start?	Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.		

20. MEDICAL KNOWLEDGE

Have a working knowledge of medical terminology for reviewing medical records, preparing computer prescription labels, computer data entry, and general information.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	When did you start?	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.		

21. HOSPITAL MEDICAL LOGS

Establish and/or maintain medical logs for controlled drugs, anesthesia, surgery, radiology, laboratory, and anesthesia/surgery mortality. Keep records for required time period and store safely.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	When did you start?	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.		

22. CLIENT SERVICE

Develop staff training for exceptional customer service which includes practice goals, the Mission Statement; and protocols for client surveys, focus groups, services, and marketing plan for the services. Have responsibility for at least two marketing efforts in the three-year period.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	When did you start?	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS:		

DUTIES CHECKLIST

Click or tap here to enter text.

23. CLIENT COMMUNICATION

Design staff training for client communications which includes protocols for at least three types. Types might include: new-client letters, referral thank-you's, vaccine reminders, sympathy cards or letters, client call backs, scripts for telephone inquiries, and client newsletters.

ARE YOU CURRENTLY PERFORMING THIS DUTY?	IF NO, WHEN WILL YOU PERFORM THIS DUTY?
Choose an item. When did you start?	Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

24. CLIENT INTERACTION

Create protocols for communicating effectively with clients, including difficult interactions with dissatisfied people. Implement staff training and establish expectations of staff.

ARE YOU CURRENTLY PERFORMING THIS DUTY?	IF NO, WHEN WILL YOU PERFORM THIS DUTY?
Choose an item. When did you start?	Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

25. CLIENT GRIEF PROTOCOL

Maintain a protocol and staff training for interaction with a client who is experiencing the loss of a pet or facing the decision to euthanize. Staff training includes consideration of the staff stress surrounding death.

ARE YOU CURRENTLY PERFORMING THIS DUTY?	IF NO, WHEN WILL YOU PERFORM THIS DUTY?
Choose an item. When did you start?	Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

DUTIES CHECKLIST

26. CLIENT EDUCATION

Create hospital brochure and educational packets specific to your practice. Create kits, such as handouts for pediatric patients, geriatric, and dental patients. Include brochures about specific ages, diseases, and preventive medical care. Show specimens, models, or pictures. Record client education and recommendations in the medical records.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

27. CLIENT EDUCATION PROGRAMS

Plan at least three veterinary health education programs for clients. Examples might be: herd health, puppy and kitten health, geriatric care, dental care, video tapes, obedience training, and behavior counseling.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

28. CLIENT/PATIENT/STAFF COMFORT

Establish a standard for cleanliness and facility maintenance which includes a written schedule for regular housekeeping. Schedule work load to create a calm, quiet environment to enhance patient recovery and to prevent staff burnout. Be able to give hospital tours at any time.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

29. PROFESSIONAL LIAISON

DUTIES CHECKLIST

Act as a liaison between the practice and professionals, such as accountants, insurance agents, architects, bankers, attorneys, and consultants.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	IF NO, WHEN WILL YOU PERFORM THIS DUTY? When did you start?	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.		

30. COMMUNITY INVOLVEMENT

Establish or maintain at least two community outreach or service programs during the three-year period. Examples: practice volunteer program, externship or cooperative placement program, open house, elementary school programs, career days, pet visitation to nursing homes, 4-H or Scouting, state fair demonstrations, and National Pet Week Observance.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	IF NO, WHEN WILL YOU PERFORM THIS DUTY? When did you start?	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.		

31. ENTER NAME OF ADDITIONAL DUTY HERE

Enter description of duty here.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	IF NO, WHEN WILL YOU PERFORM THIS DUTY? When did you start?	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.		

32. ENTER NAME OF ADDITIONAL DUTY HERE

Enter description of duty here.

ARE YOU CURRENTLY PERFORMING THIS DUTY?	IF NO, WHEN WILL YOU PERFORM THIS DUTY?
--	--

DUTIES CHECKLIST

Choose an item.	When did you start?	Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.		

33. ENTER NAME OF ADDITIONAL DUTY HERE

Enter description of duty here.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

34. ENTER NAME OF ADDITIONAL DUTY HERE

Enter description of duty here.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

35. ENTER NAME OF ADDITIONAL DUTY HERE

Enter description of duty here.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.	

36. ENTER NAME OF ADDITIONAL DUTY HERE

DUTIES CHECKLIST

Enter description of duty here.

ARE YOU CURRENTLY PERFORMING THIS DUTY? Choose an item.	IF NO, WHEN WILL YOU PERFORM THIS DUTY? When did you start?	IF NO, WHEN WILL YOU PERFORM THIS DUTY? Click or tap to enter a date.
TASK NOTES / MODIFICATIONS: Click or tap here to enter text.		

Signatures

We certify that the veterinary practice management professional identified below is responsible and accountable for the duties and functions outlined in this job description for a veterinary practice management professional.

Manager/Administrator Signature

Practice Owner/Supervisor/Employer Signature

Manager/Administrator Name (please print)

Practice Owner/Supervisor/Employer Name
(please print)

Date

Date

CVPM Credential

Why Become a CVPM?

The Certified Veterinary Practice Manager (CVPM) credential is offered solely through the VHMA and represents the highest level of certification a veterinary practice management professional can achieve.

Investing in the CVPM credential is an investment in yourself and your long-term career. CVPMs:

- Excel as leaders
- Are recognized as role models
- Enjoy greater earning potential
- Have access to more career opportunities



How to Become a CVPM

Below is a four-step guide to becoming a Certified Veterinary Practice Manager. For complete information about the CVPM process, go to www.vhma.org.

STEP 1: QUALIFY

Candidates must demonstrate:

- A minimum of three years of experience as a practice manager and proficiency in 26 of 30 duties, including: development, maintenance, computer training, communication, interaction, records, safety, benefits, payroll, accounts receivable, income reconciliation, credit policies, accounts payable, inventory, financial reporting, budgeting, purchasing, fee setting, client communication, client interaction, client grief protocol, client education, clients education programs, client/patient/staff comfort, professional liaison and community involvement
- Completion of 18 college semester hours in management related courses, such as: accounting, economics/finance, computer science, marketing, management, labor relations/human resources, law/taxation
- 48 hours of management-focused continuing education courses
- Four letters of recommendation

STEP 2: APPLY

Go to www.vhma.org to download the CVPM application. Submit the completed application, along with the application fee and supporting documentation to VHMA.

STEP 3: TAKE EXAM

Upon application approval candidates have two years to take the electronic examination offered through local test centers in the United States and Canada. The examination is composed of true-false and multiple-choice questions about relevant management knowledge in Human Resources, Law and Ethics, Marketing and Client Relations, Organization of the Practice, and Financial Management.

STEP 4: CONTINUING EDUCATION

Once certified, CVPMs commit to ongoing continuing education standards.