STANDARD OPERATING PROCEDURE

Veterinary Patient Admission SOP

Document no.	SOP-VET-001
Revision	1.0
Owner	Practice Manager
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Review cycle	Every 12 months

1. Purpose

To admit each patient consistently and safely, capturing accurate owner and health information, flagging risks, and routing the patient to the right care area without delay.

2. Scope

Applies to scheduled appointments, drop-offs and walk-ins at the front desk. Surgical patients also follow the surgical preparation SOP once admitted.

Definitions

PMS	Practice management system used to record client, patient and appointment information.
Triage	A quick assessment to prioritize patients needing urgent attention ahead of routine appointments.
Isolation protocol	Separating a patient suspected of a contagious disease from the general waiting and treatment areas.

3. Responsibilities

Client Service Representative	Greets clients, updates records in the PMS and manages the waiting area.
Veterinary Technician	Takes history, records vitals and weight, and flags patients needing urgent attention.
Veterinarian	Reviews flagged cases, approves isolation and confirms the patient is ready for examination.
Pet Owner	Provides accurate history, signs required consent forms and confirms contact information.

RACI matrix

Activity	Client Service Representative	Veterinary Technician	Veterinarian	Pet Owner
Greet client and update PMS record	R/A	I	-	C
Take history and record vitals	I	R/A	I	C
Flag and isolate a suspected contagious patient	I	R	A	I

Activity	Client Service Representative	Veterinary Technician	Veterinarian	Pet Owner
Obtain signed consent for procedures	R	C	A	R
Assign patient to exam room or kennel	R/A	C	I	-

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Practice management system (PMS)
- Digital scale for weighing patients
- Consent and estimate forms
- Muzzles, towels and restraint equipment
- Isolation kennel or holding area
- Vaccination and medication history forms

Personal protective equipment

- Disposable nitrile gloves
- Muzzle or cat bag for handling fractious patients

5. Procedure

Step	Task	Owner	Done
5.1	**Greet the client and patient** Greet the client warmly at check-in, confirm the appointment or reason for the visit, and bring the patient into a quiet area of the waiting room if possible.	Client Service Representative	☐
5.2	**Verify and update the PMS record** Confirm the owner's contact information, patient details and any account balance in the PMS, updating anything that has changed since the last visit.	Client Service Representative	☐
5.3	**Take the presenting history** Ask the owner about the reason for the visit, onset and duration of any symptoms, current diet, medications and recent vaccination history.	Veterinary Technician	☐
5.4	**Weigh the patient and record vitals** Weigh the patient on the digital scale and record baseline vitals such as temperature, heart rate and respiratory rate as appropriate for the visit type. **Checkpoint:** Weight and baseline vitals are recorded in the PMS before the patient is roomed.	Veterinary Technician	☐
5.5	**Screen for behavioral risk** Observe the patient's body language and ask the owner about any history of fear, anxiety or aggression, and apply a muzzle or other safe handling method if indicated. **Warning:** Never attempt to restrain a fractious patient alone; get a second team member before proceeding.	Veterinary Technician	☐

Step	Task	Owner	Done
5.6	**Screen for contagious disease risk** Ask about exposure to other sick animals and observe for signs such as vomiting, diarrhea or respiratory symptoms that suggest an isolation protocol is needed.	Veterinary Technician	☐
5.7	**Move a suspected contagious patient to isolation** If contagious disease is suspected, move the patient directly to the isolation area and notify the veterinarian before it has contact with other patients. **Checkpoint:** A patient suspected of a contagious disease does not pass through the general waiting area.	Veterinary Technician	☐
5.8	**Obtain signed consent and estimate** For any procedure beyond a routine exam, review the estimate with the owner and obtain a signed consent form before proceeding.	Client Service Representative	☐
5.9	**Attach prior records** Attach any referral records, prior lab results or imaging provided by the owner or a previous clinic to the patient's file before the exam.	Veterinary Technician	☐
5.10	**Collect deposit or payment authorization** For procedures requiring a deposit, collect payment or a payment authorization per practice policy before the patient is admitted for treatment.	Client Service Representative	☐
5.11	**Confirm emergency contact information** Confirm a reachable phone number for the owner during the visit, and an alternate emergency contact if the owner cannot be reached.	Client Service Representative	☐
5.12	**Assign to exam room or kennel** Assign the patient to an available exam room or kennel, notify the veterinarian the patient is ready, and update the patient's status in the PMS.	Client Service Representative	☐

6. Quality checks

- Weight and vitals are recorded in the PMS for every admitted patient.
- Behavioral and contagious disease risks are screened before roaming the lobby.
- Signed consent is on file before any procedure beyond a routine exam.
- Emergency contact information is confirmed and current for every visit.

7. Records

- PMS patient and client record
- Signed consent and estimate forms
- Isolation protocol log
- Vaccination and medication history

8. KPIs

- Average time from check-in to exam room
- Percentage of admissions with complete vitals recorded
- Number of isolation protocols initiated per month
- Client wait time in the lobby

9. Common mistakes

- Skipping the weight check because the patient seems calm and cooperative.
- Letting a coughing or vomiting patient sit in the general waiting area.
- Proceeding with a procedure before the consent form is signed.
- Not updating the owner's phone number when it has changed.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Ilia Pirozhenko

Approval

Prepared by	Approved by	Date

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