The Role and Duties of a Practice Manager
AVPMA

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This document is designed to provide a guide to the duties of a typical veterinary practice manager. It is not definitive and serves as a guide only. It is based upon a publication from the Veterinary Practice Management Association of the UK.

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GENERAL MANAGEMENT OFFICE MANAGEMENT

1. Reconcile receipts, day-sheets, income reports, bank deposits and the petty cash, and understand the essential components of any reconciling system.

2. Set and enforce effective credit control – to include monitoring debtors, sending regular invoices and statements, dealing with overdue account collection and the small claims court, queries on accounts, setting up payment agreements. Be able to complete pet insurance claims and deal with queries.

3. Deal effectively with day to day banking transactions, eg credits, automated credits and debits, standing orders, cash handling, returned cheques etc. Be able to reconcile bank statements.


5. Set up suitable filing and archiving systems for financial, personnel and general practice records and information, and understand the requirements for security and for keeping financial records for the ATO.

6. Understand the application and general care of standard office equipment, including furniture, filing systems, photocopier, franking machine, calculators, computers and printers.

7. Be aware of telecommunications options available to practices, their application, selection and general cost, and be able to train staff in the use of such systems.

8. Control office stock including stationery, stamps and other consumables.

9. Liaise with trades people and arrange for the monitor repairs and minor alterations to practice premises, eg plumbing and heating repairs, electrical maintenance, air conditioning, flooring repairs etc.

10. Prepare and implement veterinary staff and support staff rosters for adequate staff coverage.

11. Prepare, review or evaluate practice manuals/staff handbooks, protocols and standards, with professional consultation where necessary.

12. Understand and implement effective communication within the practice to include organising, chairing and minuting meetings, written staff communications, and problem solving.
FINANCIAL MANAGEMENT

FINANCIAL ACCOUNTS

1. Understand the purpose and the components of the balance sheet and profit and loss accounts.

2. Recognise the importance of profit, cash flow and gearing.

3. Identify a number of financial ratios including revenue and cost headings as a percentage of revenue and measures of liquidity, profitability and working capital activity.

4. Understand the importance of monitoring historical financial trends.

MANAGEMENT ACCOUNTS

1. Understand the difference between financial accounts and management accounts.

2. Prepare and monitor a management accounting layout and understand the use of spreadsheets and other computer based tools for management purposes.

3. Identify and monitor financial and other performance trends in consultation with the practice owner and advisors.
PERSONNEL MANAGEMENT

1. Be aware of current employment legislation as it affects veterinary practice, including entitlement to a contract, minimum periods of notice, redundancy, unfair dismissal and general employment rights.

2. Be aware of matters which should be addressed in an employment contract, and be able to prepare and review contracts of employment for employees of the practice.

3. Prepare and review job descriptions for all professional and support staff.

4. Be aware of current benefit arrangements as they affect veterinary practice, to include sickness and maternity leave, statutory sick pay, statutory holiday pay and the impact of these schemes on small and larger practices.

5. Understand of the PAYE system, the records to be kept, calculation of gross and net pay, completion of PAYE returns and the position of self-employment locums.

6. Prepare effective advertising for new staff, assess and short list applicants, interview, select and appoint staff.

7. Understand grievance procedures, and the procedures required for staff dismissal and redundancy.

8. Understand the basic principles of:-
   - Staff motivation
   - Team and group working
   - Methods of assessing employee performance
   - Staff appraisal
   - Reward systems, including profit related pay, bonus schemes and perks
   - Leadership

9. Have a working knowledge of group and individual training methods, including the application of written, audio-visual, video and computer based learning techniques. Be able to develop a practice training needs analysis, identify individual training needs and evaluate training. Understand the general training requirements for veterinary surgeons, veterinary students, veterinary nurses, student nurses and other support staff, and the options for fulfilling these within the practice and externally.
COMPUTER USAGE

1. Have a basic understanding of computer (PC) terminology and the necessary hardware components of a stand alone and networked computer system, including different types of printers, back up systems, portable computers and magnetic and other media. Understand the types of applications for which computers are used in small and medium sized businesses, and the software which might be necessary.

2. Assess the suitability of available computer programs for use in the practice for the following:-
   - Book keeping, including petty cash control and producing BAS returns
   - Management accounting
   - Producing accounts to trial balance
   - Annual budget setting
   - Client and patient database management including medical and financial records, laboratory and graphical data
   - Recall systems for preventative health care
   - Pricing of procedures
   - Stock control, including pricing and ordering
   - Appointments diaries
   - Portable use on the farm and other visits
   - Other database applications

3. Plan, monitor and review a manual or computer-based medical record system.
STATUTORY AND ETHICAL REQUIREMENTS

1. Be aware of the ethical requirements of a veterinary practice and the need to ensure that professional and support staff fulfils their ethical responsibilities. Be familiar with the contents of the AVA Guide to Professional Conduct.

2. Be familiar with animal import and export procedures and associated documentation relating to the movement of animals into and out of Australia. Understand the relationship of the veterinary surgeon with the relevant government departments, when working in an official capacity.

3. Understand and comply with statutory legislation for prescription medications and controlled drugs.

4. Understand and comply with Occupational Workplace Health and Safety Regulations current at the time, including:-
   - Practice policy statement
   - Local Rules eg public areas, animals handling, anaesthetic gases
   - Radiation Safety
   - Pharmacy and dispensing: labelling, legal categories, correct transport and storage of medicines in the practice and on clients premises
   - Requirements for dispensing drugs for off-label use
   - Fire Regulations
   - First Aid at Work Regulations
   - Display Screen Regulations
   - Clinical Waste Regulations
   - Electricity at Work Regulations
   - Arrangements for pregnant and nursing mothers

5. Carry out an effective and comprehensive review of OWHS, alone or with the guidance of a suitable consultant or senior member of the practice.

6. Understand the importance of consultation in setting and monitoring OWHS policies in the practice.

7. Review and monitor security arrangements for staff, premises and money.

8. Understand the importance of a correctly signed consent form, how it should be worded and other matters relating to professional indemnity.

9. Be aware of other legislation affecting the veterinary profession in Australia.
STRATEGIC MANAGEMENT

1. Understand how to prepare a business plan, and the appropriate involvement of other staff members.

2. Understand the use of:-
   - The SWOT analysis
   - Setting objectives
   - The marketing, personnel and financial plans

FINANCIAL CONTROL AND ASSET MANAGEMENT

1. Prepare a financial plan to identify and achieve agreed financial and other objectives, including projections for income and expenses based on past performance, cash flow forecasts and sensitivity analysis.

2. Be able to discuss various strategies for fees and develop, monitor and update fee schedules.

3. Be aware of average and best published figures for practice performance, eg turnover per veterinary surgeon, stock turnover, debtor days, direct costs as a % of turnover, proportion of income derived from fees -v- drug sales in large, mixed and small animal practices.

4. Research and compare major purchases of new equipment, compare different payment methods, calculate payback time, negotiate and review service contracts.


6. Understand the requirements for adequate practice insurance cover and professional indemnity insurance.

7. Liaise between practice and professional advisors such as accountants, solicitors, consultants and insurance advisors.

8. Be aware of current taxation law as it affects a practice or partnership.

9. Be aware of the options available for financing or refinancing practice purchase, premises and equipment.
STOCK CONTROL AND MANAGEMENT

1. Establish and maintain stock control arrangements, including:
   - Storage of drugs and supplies
   - Comparing prices, discounts and service from suppliers and wholesalers
   - Maintaining stock price policies, understanding the use of mark up
   - Ordering supplies

2. Liaise with suppliers, set up payment agreements and negotiate and monitor discounts.

MARKETING

1. Understand the principles of marketing as they relate to veterinary practice, market research, target marketing, pricing and promotion.

2. Plan and co-ordinate the provision of health care educational and support programmes, eg
   - Herd health (fertility, mastitis/udder health, nutritional/metabolic advice)
   - Lameness and foot care
   - Puppy and kitten health
   - Puppy socialisation classes and obedience training
   - Geriatric health
   - Dental health
   - Nutritional counseling
   - Pet loss support group

3. Understand the marketing of prescription and OTC category drugs, and lifestyle and prescription diets in practice.

4. Plan and co-ordinate practice promotional events, eg client educational evening, open day/evening, career day, pet show, and National Pet Week event.

5. Prepare a written marketing plan, monitor results, and be responsible for production of practice brochures/newsletters, and client surveys.

6. Understand the impact of animal and veterinary fees insurance, and their promotion within the practice.
CLIENT COMMUNICATIONS

1. Establish standards and written protocols for client communications in the practice, eg telephone answering, in-patient queries, reminders, sympathy cards/letters, new client introduction etc.

2. Liaise between veterinary surgeons, support staff and clients, deal with complaints and understand the implications of advice given to veterinary practices by professional indemnity insurers.

3. Have an understanding of the principles of good client service and the importance of the customer.

THE BUSINESS OF VETERINARY PRACTICE

1. Have a working knowledge and adequate understanding of common veterinary medical terminology.

2. Understand and be able to explain to staff and clients basic veterinary preventative health protocols and/or health management programmes for zoonotic diseases, parasite control and diseases preventable by vaccination.

3. Prioritise queries and requests from clients on clinical matters.

4. Have an appropriate understanding of the requirements in a veterinary practice for the following procedures:-
   - Neutering
   - Dental prophylaxis
   - I/V injections and sampling
   - Radiography and processing radiographs
   - Induction of anaesthesia and associated risks
   - Preparation and despatch of lab samples
   - Referral procedures

5. Understand basic principles of hygiene and disinfection, and be able to establish and monitor checklists to ensure standards for cleanliness and appearance of all areas of the practice premises.

6. With appropriate professional guidance, be able to establish and maintain data monitoring systems within the practice, eg
   - Controlled drugs
   - Radiography exposures
   - Surgery work
   - Laboratory work
Australian Veterinary Practice Management Association

VISION
To promote and improve management within the veterinary industry.

MISSION STATEMENT
To enhance quality of life in Australian Veterinary Practices by enabling AVPMA members to develop personal skills in veterinary practice management and by providing resources and networks that enhance veterinary practice management through knowledge sharing and knowledge creation and through the fostering of relationships and personal support that comes from belonging to the association.

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✓ Regular newsletters
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✓ Free copy of AVPMA proceedings from AVA Annual Conference
✓ Access to the members only area of the AVPMA Website. www.avpma.com.au

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