

# Veterinary Urgent Visit Intake Checklist

A free intake checklist for veterinary clinics handling urgent calls, same-day visits, and worried pet owners who need a clearer next step fast.

Veterinary owners, CSRs, clinic managers, and front-desk teams

## GUIDE

A free intake checklist for veterinary clinics handling urgent calls, same-day visits, and worried pet owners who need a clearer next step fast.

## WHAT THIS ASSET COVERS

- A same-day and urgent-call intake sequence for symptoms, timing, and patient history basics
- Prompts for pet status, transport, and emergency escalation
- A handoff structure for doctor review and appointment routing

## USE THIS WHEN

1. Same-day or urgent pet visits feel chaotic at intake
2. CSR notes vary too much by staff member
3. The clinic wants cleaner triage before appointment placement

## WORKING ASSET

## CAPTURE FIRST

- pet name
- species and age
- caller callback number
- symptoms and timing
- breathing, bleeding, seizure, or trauma now

## CLARIFY

- current medications
- recent procedures
- able to travel now or not

## ROUTE

- emergency now
- same-day visit
- callback with next step

## DEPLOYMENT NOTES

### HOW STRONG TEAMS ACTUALLY USE THIS ASSET

- Assign one accountable owner instead of letting "Veterinary Urgent Visit Intake Checklist" become shared but unmanaged work.
- Use it with veterinary owners, csrs, clinic managers, and front-desk teams in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

### BEST DEPLOYMENT SEQUENCE

- Same-day or urgent pet visits feel chaotic at intake
- CSR notes vary too much by staff member
- The clinic wants cleaner triage before appointment placement

### WHAT SEPARATES A SERIOUS VERSION FROM A BASIC TEMPLATE

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
- Specific working components: A same-day and urgent-call intake sequence for symptoms, timing, and patient history basics, Prompts for pet status, transport, and emergency escalation, A handoff structure for doctor review and appointment routing.

- A built-in review cadence so the document becomes part of operations rather than a one-time download.