## ACMVET4X16 Undertake administration and client service activities in a veterinary practice

#### Unit outcomes

This unit describes the knowledge and skills required to perform a broad range of reception, client service and administrative support functions which contribute to the efficient daily operations of a veterinary practice.

It includes responding to client enquiries, managing bookings and correspondence, maintaining workplace records and information systems, processing accounts and billing activities and carrying out inventory management and stock control processes, including of medicines.

The unit is applied in contexts where individuals work with moderate autonomy and responsibility for organising their own work, communicating professionally and within their scope of practice including with clients, handling confidential information, and maintaining the accuracy and quality of administrative outputs.

**Licensing, legislative, regulatory requirements**

Legislative and regulatory requirements apply to the acquisition, storage, handling and security of medicines, pharmaceuticals and controlled substances but vary between state/territory jurisdictions.

Regulatory requirements relating to the provision of client information, advice and support, particularly where this relates to health, treatment or regulated products also differ across jurisdictions. Users must check with the relevant regulatory authorities before delivery.

#### Knowledge

* administrative functions, principles of client service, workflows and quality expectations that support effective service delivery in a client focused environment
* workplace procedures for receiving and responding to enquiries and communication protocols including for escalating urgent, complex or sensitive matters
* requirements for managing bookings including priority management, sequencing, time allocation, confirmations and communication of changes
* information management protocols and workplace systems and policies for producing documentation and correspondence, maintaining records and using digital systems and online ~~social media~~ platforms
* privacy, confidentiality, data security and ethical obligations relevant to handling client and organisational information
* accurate billing, invoicing and basic financial administration processes
* stock and inventory control principles, including those related to handling and storing medicines
* problem-solving techniques to address workflow delays, incomplete information, booking conflicts, stock shortages or discrepancies or unexpected client needs

#### Skills

* provide professional reception and client-service interactions in person, by phone and through digital communication systems, including responding to client enquiries within scope of work role or referring to authorised persons, and scheduling and managing appointments
* prepare, process and maintain workplace documentation, records, correspondence and digital files
* use workplace administration systems, including databases, scheduling tools, communication platforms, billing systems and stock management software
* create, verify and update invoices, estimates, statements and financial documents
* maintain inventory levels of organisational supplies, including ordering, receiving, storing and securing where necessary
* follow privacy, confidentiality and data-security requirements when handling client or organisational information, including on online platforms
* prioritise and organise work tasks in line with workflow demands, workplace procedures and quality requirements
* identify problems or changes impacting service delivery and implement or recommend solutions within level of authority

#### Application of knowledge & skills

This unit applies to work carried out by individuals who perform administrative support and reception and client-service functions in a broad range of workplaces. Individuals undertake a range of responsibilities including managing enquiries, scheduling and managing appointments, maintaining records, processing accounts and supporting inventory or stock control processes within the limits of their job role and organisational procedures.

Individuals will apply broad factual and technical knowledge of workplace administration systems, information management processes, billing and financial procedures, and inventory management and stock handling requirements to support the smooth and efficient operation of the practice. They will use judgement to undertake routine tasks and identify issues requiring escalation.

They will obtain, record and update accurate and relevant information through in-person, telephone and digital interactions, and prepare or maintain documentation to support organisational, operational or regulatory requirements, including maintaining confidentiality and privacy requirements.

Individuals will exercise autonomy in planning and completing routine or predictable administrative tasks, using initiative to maintain accuracy and workflow efficiency. Matters involving complex enquiries, decisions outside their authority, regulated advice or discrepancies requiring higher-level approval will be referred promptly in line with organisational procedures.

#### Pre-requisite unit Nil

#### Unit sector

Veterinary Nursing (VET)

#### Foundation skills

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Learning** | **Reading** | **Writing** | **Oral communication** | **Numeracy** |
| 3 | 4 | 4 | 4 | 4 |

**Other foundation skills information**

Digital literacy to use technology for written communication, calculating and processing financial transactions, online booking / appointment scheduling and records management

**Assessment Requirements**

**Performance evidence**

Individuals must apply the knowledge and skills specified in the unit of competency to:

* respond to a minimum of six different client enquiries, including at least three in-person and two via phone or digital technology
* create, update and maintain at least three types of workplace records or documentation, including digital entries
* schedule and manage at least five appointment bookings including confirmations, changes or cancellations
* communicate patient intake and pre-treatment procedures to at least three clients, where each patient is scheduled for a different treatment or procedure
* prepare, process or reconcile a minimum of three financial documents, such as invoices or receipts
* perform the following stock control activities:

receive and store a stock order

store and secure regulated medications, drugs or poisons

order workplace supplies

conduct simple stock counts and identify discrepancies

**Knowledge evidence**

To demonstrate the application of the knowledge specified in this unit of competency, individuals must have knowledge of:

* typical administrative workflows and service-delivery requirements
* customer-service principles
* core organisation products and services and common client enquiries
* scope of work role in provision of information, and protocols including for escalating urgent, complex or sensitive matters
* appointment scheduling and booking processes and systems, including:

priorities

time allocation for appointment purpose

confirmations, changes and cancellations

* procedures for managing documentation, including:

retention, retrieval and filing conventions

templates

style guides

* practice’s privacy, confidentiality, ethical and data security principles and legal obligations
* invoicing, billing, financial recordkeeping and basic reconciliation processes
* stock and inventory management systems and procedures
* organisational policies, procedures and quality requirements relevant to client service and administration
* relevant legislation and regulations, including key features of legislative requirements relating to the ordering, storage and security of medications and other drugs and poisons

**Assessment conditions**

Skills must be demonstrated in a workplace or an environment that accurately represents real workplace conditions

Assessment must ensure access to:

* clients and/or realistic simulations of client service situations
* technology (phone, email, booking/scheduling systems, record databases, financial administration tools typically used in the workplace such as point of sale (POS) software, EFTPOS hardware)
* workplace documentation templates, software and technology
* organisational supplies, inventory and stock, including medicines typically used in the workplace
* relevant organisational policies and procedures
* administrative equipment typically available in the workplace

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

#### Unit mapping information

|  |  |  |  |
| --- | --- | --- | --- |
| **Code and title current version** | **Code and title previous version** | **Equivalence status** | **Comments** |
| ACMVET4X16 Undertake administration and client service activities at a veterinary practice | ACMVET201 Assist with veterinary nursing reception duties | Not equivalent | Merged with units; ACMVET202 Carry out daily practice routines, ACMVET401 Coordinate veterinary reception duties and ACMVET404 Perform practice office procedures.  Element 4 Maintain practice records according to practice policies and PC 1.3 establishing client or patient records included in this unit to reduce duplication |
| ACMVET4X16 Undertake administration and client service activities at a veterinary practice | ACMVET202 Carry out daily practice routines | Not equivalent | Merged with units; ACMVET201 Assist with veterinary nursing reception duties, ACMVET401 Coordinate veterinary reception duties and ACMVET404 Perform practice office procedures.  Element 3 Assist in stock control and practice security and associated PCs 3.1, 3.2, 3.3 and 3.4 included in this unit. |
| ACMVET4X16 Undertake administration and client service activities | ACMVET401 Coordinate veterinary reception duties | Not equivalent | Merged with units; ACMVET201 Assist with veterinary nursing reception duties, ACMVET202 Carry out daily practice routines and ACMVET404 Perform practice office procedures.  Element 1 and PCs relating to reception included in this unit.  Removed requirement for mandatory work placement and for performance evidence activities to be performed in a veterinary practice in a specified number of hours. |
| ACMVET4X16 Undertake administration and client service activities | ACMVET404 Perform practice office procedures | Not equivalent | Merged with units; ACMVET201 Assist with veterinary nursing reception duties, ACMVET202 Carry out daily practice routines and ACMVET401 Coordinate veterinary reception duties.  Title change and change to Application wording. Removed requirement for reception and other administrative activities to be undertaken by veterinary nurses.  PCs and elements replaced by knowledge, skills and application as per ASK template.  Removed requirement for mandatory work placement and for performance evidence activities to be performed in a veterinary practice in a specified number of hours. |

### Overview information

#### Modification History

|  |  |
| --- | --- |
| **Release** | **Comments** |
| 1 | This unit of competency was first released in ACM Animal Care and Management Training Package Release 7.0. |

**Mandatory workplace requirements:**

Assessment of performance evidence may be in a workplace setting or an environment that accurately represents a real workplace.