



Open Door Training

Syllabus for Open Door Veterinary Collective's (ODVC's) Online Course Offering

Financial Triage for Veterinary Practices

Course Description

Increase access to veterinary care by performing financial triage and offering a spectrum of payment options that makes your practice stand out as financially friendly.

Intended Audience

For professional students and their faculty.

Cost to Enroll

Contact [Open Door Veterinary Collective](#) for a link to enroll at no cost.

Expected Time to Complete Course

3 hours

By the end of this course, students will be able to:

- **KNOW:** How to address affordability barriers to accessing veterinary care by performing financial triage and offering a spectrum of payment options that allows more clients to comply with the services we offer, keeps practices sustainable, and maintains our professional satisfaction.
- **VALUE:** Appreciate that addressing affordability barriers with a spectrum of payment options helps more clients comply with diagnostic and treatment plans, maintains practice profitability, and promotes positive well-being for the veterinary care team.
- **DO:** Create a financially friendly practice that normalizes conversing and finding



solutions between veterinary practices and clients about affordability of care.

Competency-Based Veterinary Outcomes (CBVE)

- **SOC Sub-competency 1.3.5** Integrates information about the patient with client circumstances to identify a range of appropriate care options and to adjust the care plan.
 - **Knowledge LO 1.** Lists the client-specific factors (e.g., expectations, goals, resources, abilities, beliefs) that may impact the client's ability or desire to pursue care options for their animal.
 - **Skill LO 1.** Elicits information from the client about factors that may affect their ability or motivation to pursue care for their animal.
 - **Attribute / Behavior LO 1.** Demonstrates empathy and respect during discussions relating to client circumstances.
 - **Attribute / Behavior LO 2.** Demonstrates active listening to identify and clarify factors that may affect the client's ability or motivation to pursue care for their animal.
- **SOC Sub-competency 1.4.4** Offers a range of care options that are tailored to the unique circumstances of each patient and client.
 - **Attribute / Behavior LO 1.** Demonstrates patience and flexibility to identify multiple care options that align with patient needs and client factors, despite uncertainty.
- **SOC Sub-competency 1.4.5** Facilitates client decision-making regarding care by presenting the costs, risks, benefits, and evidence-base of care options
 - **Knowledge LO 1.** Defines the characteristics of "shared decision-making".
 - **Knowledge LO 2.** Explains the costs, benefits, limitations, uncertainties, and care-giving responsibilities associated with a range of care options, including not proceeding with further veterinary care.
 - **Skill LO 1.** Invites a discussion of which care options may best align with a client's expectations and capabilities.
- **SOC Sub-competency 8.1.4** Provides a range of care options to a diverse clientele in a manner that fosters financial viability of the practice.
 - **Knowledge LO 1.** Identifies components of the practice's profits and losses as they relate to providing care options.



- **Knowledge LO 2.** Explains how providing a range of care options can have a positive financial impact on the practice.

Content Outline.

Chapter 1: Open the Door to Financially Friendly Practices

Chapter 1 Organizing Questions

- What will we learn?
- How do we navigate this course?

Chapter 1 Lessons

1. How to Use this Learning Platform.
2. Let's Get Started!
3. What's In This Course?
4. Meet the Open Door Veterinary Collective
5. Help Us Get to Know You

Chapter 2: Perform Financial Triage

Chapter 2 Organizing Questions

- How do we increase clients' perceived value of veterinary services to promote compliance with treatment plans?
- Why can't we just work with all of our clients in the same way?

Chapter 2 Learning Objectives

KNOW: Recognize how our differing assumptions and perceptions about the value of veterinary care can lead to misunderstandings with clients and result in increased moral distress for the veterinary care team.

VALUE: Appreciate how performing financial triage and sorting veterinary clients into "buckets of care" based on their financial needs can help us increase compliance and enable us to provide veterinary care for more bonded families.

DO: Perform financial triage and offer a spectrum of payment options that match the contextual needs of bonded families so they are more likely to comply with our veterinary diagnostic and treatment plans.

Chapter 2 Lessons



1. Meet Your Instructors
2. Learning Objectives
3. Perceptions of Value
4. Everyone Has a Story
5. Triage Your Clients' Financial Needs
6. Show Me the Evidence!
7. Let's Put This to Work
8. End of Chapter 2 Quiz

Chapter 3: Offer a Spectrum of Payment Options

Chapter 3 Organizing Questions

- What payment options are available, and how do they differ?
- Can these options increase compliance, support practice profitability, and decrease moral distress for the veterinary care team?

Chapter 3 Learning Objectives

KNOW: Recognize how traditional credit systems used by veterinary clinics might not be enough to meet the financial needs of many bonded families, thus leaving clients unable to afford veterinary care and decreasing staff well-being when the team must engage in many difficult conversations about costs of care.

VALUE: Appreciate that offering non-traditional payment plans reduces staff distress by being able to meet the financial needs of more clients, thus resulting in fewer difficult conversations about costs of care and increased practice profitability.

DO: Leverage financial support options to better meet the needs of veterinary clients, thus increasing their ability to comply with treatment plans and resulting in improved staff well-being.

Chapter 3 Lessons

1. Meet Your Instructors
2. Learning Objectives
3. What Are the Options?
4. Payment Option 1: Payment Plans Controlled by the Financial Service
5. Payment Option 2: Pet Insurance Plans
6. Payment Option 3: Pay-Over-Time Plans Controlled by the Veterinary Practice
7. Payment Option 4: Charity, Crowdfunding and Community Partnerships
8. Pay-Over-Time Options in Action
9. How Payment Options Work in General Practices



10. How Payment Options Work in Emergency Veterinary Practices
11. How Payment Options Work in Nonprofits
12. How the Money Multiplier Effect Works
13. Let's Put This to Work
14. End of Chapter 3 Quiz

Chapter 4: Keep Practices Profitable

Chapter 4 Organizing Questions

- How can we apply a financially friendly veterinary practice model that offers a spectrum of payment options to our clinic?
- Can we increase compliance with our treatment plans and maintain clinic profits without discounting?

Chapter 4 Learning Objectives

KNOW: How to integrate a spectrum of payment options into veterinary business models.

VALUE: The importance of including the entire veterinary care team into discussions about finances and payment options.

DO: Remove stigma from financial conversations so that both clients and staff are comfortable discussing budgets.

Chapter 4 Lessons

1. Meet Your Instructors
2. Learning Objectives
3. Make Your Practice Financially Friendly
4. Payment Support Team
5. Make Your Practice "Fear Free" for People
6. Let's Put This to Work
7. Leave Your Feedback About This Course
8. You Did It (Almost!)
9. End of Chapter 4 Quiz

Course Instructors and Designers from Open Door Veterinary Collective

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Expectations and Policies

Course Website = <https://opendoorconsults.org/>

Course Delivery

- Courses are interactive, self-paced, and delivered asynchronously/on-demand.
- The curriculum is modular and can be completed in any order.
- Each course is expected to take approximately 3 hours to complete.
- Once enrolled, students are allowed 90 days of online access to each course.
- The lessons apply universal instructional design principles in order to be as accessible as possible for the diverse needs of learners and ADA compliant.

Required Technology

- Computer with reliable, high-speed internet access
- Your preferred web browser
- Video player with ability to play MP4 videos
- Speakers and/or headphones
- PDF reader
- Most course activities will work on mobile devices, such as cell phones or tablets, but these technologies can be unreliable

