

LANAnC7 - SQA Unit Code HA8J 04

Make appointments for clients



Overview

This standard covers making appointments for clients and their animals and dealing with enquiries.

It is important to maintain good relationships with clients so they continue to have confidence in the services of the business. It is also important to work as part of the team, seeking advice from senior members of staff when required.

This standard is suitable for anyone who makes appointments for clients.

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Performance

criteria

You must be able to:

- P1 treat everyone making enquiries in a polite manner and provide additional assistance where required
- P2 correctly identify the purpose of the enquiry
- P3 refer enquiries that cannot be dealt with promptly to the relevant person for action
- P4 give clear and accurate information
- P5 access existing records or prepare new records according to procedures
- P6 deal with all requests for appointments politely and promptly
- P7 make appointments that are appropriate for the animal and the purpose of the appointment and that ensure the most productive use of time
- P8 confirm the availability of services, where necessary, with relevant colleagues
- P9 confirm appointment details are acceptable to the client
- P10 obtain the necessary information to make the appointment e.g. client's details, animal's details, animal's history
- P11 ensure all appointment details are accurate and recorded in the right place
- P12 give clear and appropriate advice to clients about policies and services
- P13 comply with data protection and client confidentiality policies.

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Knowledge and understanding

You need to know and understand:

- K1 procedures for taking messages
- K2 the reasons for confirming the client's identity and requirements for services
- K3 the importance of making appointments correctly
- K4 conditions that require urgent appointments and how these should be organised
- K5 the importance of communicating effectively
- K6 how to make appointments and access records
- K7 how to ask the right questions and give suitable answers to questions
- K8 the services available, their duration and cost
- K9 how the appointment system works
- K10 the limits of your own authority when making appointments
- K11 legislation affecting the movement of animals
- K12 the principles and legislation that apply to data protection and client confidentiality.

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