

Go Live Ready Checklist

- Calendar
- Calendar View (Resource, Day, Week)
 - Resources Set (if used)
 - Minute Intervals
 - Boarding Cages/Calendar
 - Blocks
 - Defaults (provider, appointment type, notifications)

- Appointments
- Appointment Type (default duration)
 - Confirm Status
 - Visit Status (add/remove whiteboard, print check-in)

- Financial
- Tax Rate
 - Payment Types
 - Payment Integration (if used)
 - Finance Charges (if used)

- Exam Form
- Customized per Species as needed
 - Linked to Procedure as needed

- Documents
- Handouts
 - Clinic Logo/Phone/Address added
 - Consent Forms
 - Discharge Instructions

- Lab Forms
- Customized per inhouse lab category (if used)

- Employees
- Username
 - Password
 - email
 - Signature for Doctors
 - Role
 - Rights
 - PIN

- Client Types
- Client Classification (reporting or tax level)
 - Client Status (pre-applied discount)

- Inventory
- Price (min,max), Cost,
 - Markup, Fee, Tier Pricing
 - Reminder setup and associations
 - Vaccine Settings (if vaccine lots and on hand counts are tracked)
 - Linked to Procedure/Lab/Inventory
 - Dispensable settings (RX Intrusions)
 - Tax Level
 - Sell Measure, Dosing, QOH

- Procedures
- Price, Cost, Markup, Fee, Tier Pricing
 - Tax Level
 - Reminder setup and associations
 - Vaccine Settings (if vaccine counts are not tracked)

- Labs
- Lab Integrations Mapped
 - Tax Level
 - Price, Cost, Markup, Fee, Tier Pricing

- Packages
- Estimates (min max qty/price)
 - Puppy/Kitten Packages (total price vs itemized price)
 - Wellness Plans
 - Surgery Packages
 - Injection packages (cyto)

- Integrations
- In house labs
 - Reference Labs
 - Dymo
 - Payment Partner

Optional/As Needed

- Core Vaccines
- Patient Monitoring
- Anesthetic Monitoring
- Reminder Templates
- History Forms
- Document Types
- Boarding



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