

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 Service Item as needed

Documents

Handouts
Practice Logo/Phone/Address added

Consent Forms
Discharge Instructions

Lab Forms

Customized per in-house lab category (if used)

Employees

Username
Password
Signature for Doctors

Role
Rights

Client Types

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

Inventory

Price, Cost, Markup, Fee, Tier Pricing
Reminder setup and associations
Vaccine Settings (if vaccine lots and on hand counts are tracked)

Linked to Service/Lab/Inventory
Dispensable settings (RX Instructions)
Tax Level
Sell Measure, Dosing, QOH

Services

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)
Treatment Bundles

Wellness Plans
Surgery Packages/Injection packages

Integrations

In house labs
Reference Labs

DYMO
Payment Partner/CareCredit

Optional/As Needed

Core Vaccines
History Forms

Patient Monitoring
Document Types

Anesthetic Monitoring
Boarding

Reminder Templates
Treatment Board



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