

People & Culture	Payroll	Every other Monday
	Clean-up Punches	By Noon CST every other Monday
	DVM Production	Depends on hospital
	Revenue Share Bonus	Monthly
	Benefit Plan – Open Enrollment	November
	Performance Evaluations (RoadMap Reviews)	Annually 4 th quarter
Operations	Productivity Plan Template	Monthly –submit by the end of the 3 rd week of the month, for the following month (e.g. Dec. plans due Fri. Nov. 19) Weekly – every Tuesday, receive email with actuals for prior week (automatically loads to template on Google Drive)
	BAPS Budget vs Spend	Sent to HMs weekly
	80% Inventory Count	October
	100% Inventory Count	Count 12/20-31, print report end of day 12/31, send documents first week of January
	Brand Tracking	As needed
Revenue Revenue Goal Adjustment Jotform link: https://form.jotform.com/212004750892047 Revenue Goal Data Error Review Request Jotform link: https://form.jotform.com/212226216020134	Pricing Assessments	1 – 2 times/year
	Revenue Goal adjustments	Last week of each month or as needed for unexpected absences
	Secret Shopping	Always available
COAST	CareVet Learning Institute (CVLI)	Quarterly
Marketing	Bi-Annual Marketing Planner	December & June
	NPS	Monthly
	Review Marketing Update	Monthly
	PetDesk setup, website migration, social media access, Vetstoria	One Time
	Branded Goods	As needed, contact Sydney Pultman spultman@carevethealth.com
Finance/Accounting	Accounts Payable	As invoices come in
	Relief DVM payments	As needed
	DVM PTO in Paycor	As needed

	Daily Deposit Reports	Daily
	Month-End Reports (monthly sales & sales tax summary, detailed inventory on-hand report, A/R detail	Monthly