

Fairbanks Veterinary Clinic

A Case Study

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Case Study Scenario

You have been hired as a consultant by the owner of Fairbanks Veterinary Clinic, Danielle Brown, to develop a system that helps the FVC team organize their services. You have visited the clinic several times to shadow the current employees and take notes about their current system and the system requirements they desire moving forward. Your job is to review the company's current situation and develop a paperless system that assists the FVC team in organizing, scheduling, and communicating their services to their customers.

Overview

Fairbanks Veterinary Clinic is a family-owned business that provides all aspects of doggy care services including veterinary, training, grooming, and kennel/daycare services.

We at FVC are passionate about giving our four-legged friends the best possible care. We form our services around your pup's specific needs, as all members of our clinic are considered family. Our clinic is run by a certified veterinary technician along with two very friendly vet tech assistants. Our grooming and training departments consist of highly-rated dog specialists, and our kennel and daycare facilities are run by mom and pop themselves, ensuring that your pup is given the most love and care while you are away.

History

Fairbanks Veterinary Clinic began as a small mom and pop doggy daycare service over a decade ago. Paul Brown graduated from the University of Colorado at Boulder with a bachelor's degree in Architecture in 1990. He moved to Houston to work for an architecture firm and met his then-girlfriend, now-wife, Danielle, in a coffee shop near the San Antonio Riverwalk. Danielle had just finished up her senior year in Film and Media Production at CU Boulder and moved to Houston to work for a local news company. Along with their mutual love for their alma-mater, the two also share a strong love for animals, particularly our four-legged best friends. Paul and Danielle were married in 1993.

As a way to interact with and care for as many dogs as they could, Dani and Paul began fostering dogs for local shelters, as well as dog-sitting for friends and family in Houston. The couple opened their home and their hearts to dogs of all backgrounds, falling in love with every pup that entered their home. Word quickly spread around the town about the dog-loving couple and their daycare services. With more and more booking requests from friends and friends of friends, they decided to turn their hobby into a small business. They advertised their dog-sitting services on a popular pet-sitter and dog-walker networking site called Rover.com and opened for business.

Shortly after opening their home to their four-legged friends, Dani and Paul decided to start a family of their own. In 1994, they welcomed their new daughter, Brooks, to the family. At this point, Dani

and Paul turned their three-bedroom house into a baby and doggy paradise. Baby gates, doggy doors, and an abundance of squeaker toys and milkbones decorated their modest Houston home.

Growing up surrounded by so many precious pups, Brooks was inspired to go to school to be a veterinary technician. After graduating from Vet School at the University of Wyoming in 2017, Brooks convinced her parents to open up a full-time doggy kennel/daycare service and veterinary clinic. They all packed up and moved to sunny Fairbanks, Texas due to the need of vet clinics in the area. They converted an old book store building into over 20 dog kennels, and a friendly, homey veterinary office. The old book store sat on a grassy one-acre lot, where Paul built a large fenced-in yard along with agility courses for the dogs to play in during daycare. With the kenneling and veterinary business quickly booming, they eventually decided to expand their services to include grooming and training.

The company now consists of 10 employees. They have two receptionists, Cody and Serena, who deal with customer bookings, medical records, supplies/stock, and employees. The training department consists of a lovely outdoorsy couple from Polson, Montana - Marie and Shey - who conduct various obedience trainings for owners and their pooches, and work for the kennel during the rest of the week. Brooks runs the vet office along with her two vet assistants (fellow graduates from Wyoming), Emily and Aleksey. Grooming is run by an outsourced groomer, Jacob, who works for FVC on weekdays and runs his own Portable Grooming-On-Wheels service out of a converted trailer on the weekends. Paul oversees kenneling and daycare while Dani manages the business of the whole operation.

Current Situation

Dani is struggling to stay organized with all of the services her company provides. She has issues with scheduling her free-lance groomer as well as organizing the various training sessions offered with her trainers. Dani knows that Cody and Serena are struggling to organize all of the client information documents and waivers in our current filing system. They would like an automated way to add customers to the system and easily look up past medical records. It is also difficult to keep track of training, kenneling and grooming supplies, and they would like an easier, more organized way to do so.

Staffing

Danielle Brown

Owner. Film enthusiast, CU Boulder Media Production alum. Family-oriented but loves being involved in business. Manages the clinic - deals with advertisers, financial advisors and employees. Makes decisions about budget issues and goals.

Paul Brown

Kennel Manager. Gallant husband to Danielle. CU Boulder Architecture alum. Loves woodworking and crafting. Has a soft spot for small, ugly dogs. Spoils his daughter and his many pups.

Brooks Brown

Veterinary Technician. Daddy's girl - sweet, charming, mild tempered. Loves spending time with her parents, but doesn't completely love working for them. Passionate about dogs from a young age. Loves outdoor sports - rafting, climbing, skiing.

Emily Tobin

Assistant veterinary technician. Wyoming native and Wyoming University veterinary school alum. Owns three horses - Shodish, Buck, and Loki. Competed in rodeos and Horse Shows growing up. Loves dogs but wants to open her own Equine Veterinary practice one day.

Aleksey Petrov

Assistant veterinary technician. Wyoming University veterinary school alum. Best friends with Emily and Brooks. Shy and introverted but very loving. Enjoys reading fantasy novels.

Cody Reynolds

Receptionist/HR. Family friend of the Brown's. Very loving and light-hearted people-person. Spends most of his time getting distracted. Spends most of his weekends riding dirt bikes with his younger brothers. Doesn't like the structure of a job but likes having money.

Serena Tanaka

Receptionist/HR. Extremely organized. Keeps Cody in check. Grew up in Japan and moved to Texas to be with her American husband. Goes to night school to learn how to be a teacher.

Marie Ellerbruch

Trainer/kennel worker. Married to Shey. Lived together in Polson, Montana until they both decided they hated the cold. They own four Australian Shepherds and love working with them. Marie also owns various barnyard animals - pigs, goats, cows, chickens... but hates cleaning up after them.

Shey Ellerbruch

Trainer/kennel worker. Married to Marie. Loves camping, building, and other rugged outdoor activities. Ends up cleaning up after his wife's animals.

Jacob (Lone Wolf) Carter

Groomer. Lone wolf. Middle aged, looks like a mountain man. Never married, no kids. Likes to travel with his three dogs - Cersei and Jaime (large white standard poodles) and Tyrion (small Norwich terrier). Also loves Game of Thrones.

Current System

Customers of our clinic create an account with us by filling out a **Client Registration Form** containing contact information and a client agreement as well as **Patient Information Form(s)** outlining their pup's allergies, medications, vaccinations, and known medical history. Each visit to our clinic is documented on an **Animal Record Form** in the account folder. If the dog will be staying in our kennel/daycare facilities, an additional **Special Care Form** is required to inform our staff of dietary restrictions and any special instructions on caring for their dog along with emergency contact information. If our customers would like to utilize our grooming services, we require an additional **Grooming Consent & Release Form**. To register for any of our training classes, customers can fill out a **Training Registration Form**, which outlines basic information about their dog and the details of the training classes offered. Our clinic also has various forms on file to send home with customers. These range from home care instructions following any medical procedures, to standard vaccination documentation forms. These vaccination forms and at-home care instruction forms are out of scope, as is the medical stock of the veterinary office.

Shadowing Journal Entries

Journal 1: Danielle Brown - Owner

My first shadowing experience was with the owner of the whole operation. I began Monday morning sitting with Danielle in her office going over the logistics of the company. I quickly noticed the stacks of filing cabinets and paperwork surrounding the office. I began by asking her to give me a run-down about how the company operates and what current organizational system is set in place. Danielle frustratingly motioned around the office and said, "This is it!" She expressed that all of the crucial customer and patient information is tucked away in these old filing cabinets bordering her office. Every morning, her receptionists come in and gather all of the files for the customer bookings made that day. They are then returned to the filing cabinets at night and it starts all over again the next day. She looked at me blushing embarrassingly and pleaded that she had wished she looked into going paperless sooner.

I pressed on and asked about FVC's online presence. Apparently, the only system set in place is a bare-bones informational website. The site consists of basic information about the clinic, forms to download and fill out prior to vet/grooming/training appointments, a "Training Class" calendar for

customers to view training courses with dates/times, and contact information (fax/phone/email) for the office. Though there is a training schedule displayed and consistently updated, it does not, however, allow clients to book classes through the website, or view current class availability. This means that all appointments and bookings are made by phone or email.

Ideally, she would want customers to have the ability to book training classes, grooming appointments, and kenneling through the website. She mentioned that adding that extra layer of calling or coming into the office makes room for human error and is unnecessary in today's technological world. Danielle told me that she would like to keep vet appointments done by phone or in person in order to document reason for visit, gather patient details, have the option to consult with vet techs over the phone, and schedule the appropriate amount of time needed for the check-up/procedure.

After noting how customers interact with FVC, I asked Danielle how she organizes employee scheduling and pay. "Timesheets! That's one place where I didn't mess up!" - She told me that she uses a 3rd party payment software called "OfficeTools" where employees can log their time. This way, she is able to set the pay rates for each employee and set up automatic monthly direct deposit. Scheduling, however, is a little more complicated. She told me that since the schedule for the trainers and groomer can be drastically different each week, and she would only have 6 employees to manage otherwise, she does not have a "formal" scheduling system. Danielle referred me to Serena and Cody to discuss the details of employee scheduling.

Journal 2: Serena Tenaka - Receptionist/HR

Today, I shadowed Serina Tanaka from the reception/HR department. She informed me that the receptionists arrive at 7:30 - half an hour before the rest of the workers -- so that they can do morning paperwork. We began by collecting the client files for the appointments scheduled for today. I asked Serena if she had a better idea for how customer files should be organized, and she rolled her eyes and said, "something better than a spreadsheet would make my life easier." Apparently, each customer of the clinic gets a file under their first and last name which includes the **Client Information Form**, and general **Patient Information Forms** for each of the pups they registered with the clinic. Whenever a patient revisits the clinic, their file will be accessed to add or retrieve any forms needed. These files will also grow if the customer utilizes FVC's training/grooming/kenneling services. "Things get messy with all these paper files - especially if the owner has multiple dogs registered with us..."

The rest of the morning consisted of answering phones, scheduling different types of appointments, and completing forms/payments with customers. She uses separate scheduling spreadsheets for vet, kennel, grooming and training services. This means she has to shuffle between them throughout the day to see available slots for each. I asked her how each department determines their schedule and she scoffed. Turns out, their freelance groomer provides Serena and Cody with his schedule every two weeks, and the customers can make appointments based on his availability. The trainers will shift the dates/times of their courses every month to provide a greater range of availability to the customers.

The kenneling availability is based on prior customer bookings and if any kennels are available for the requested time slot. The only consistent, 40-hour-per-week scheduling is with veterinary appointments. Brooks and her vet tech assistants work full time and will offer vet appointments from 8-5 each week day. Serena and Cody compile all of the service schedules each month and come up with a master shared scheduling spreadsheet that allows them to book any of the services when customers call.

Journal 3: Shey Ellerbruch - Trainer

Today I shadowed one of the trainers/kennel workers. I arrived at the training facility (the basement of the building attached to an outdoor yard) at 8am. Shey first explained to me that he works as a trainer fairly regularly and a kennel worker during busy seasons. His wife, Marie, works with him as a trainer and works for the kennels in the evening. He says that the scheduling for that gets complicated because they are somewhat “on call” for kenneling, but get paid by the hour. Generally, if there are no training sessions going on, Shey and Marie will be helping Paul with walking/feeding dogs or cleaning. “There is always something that needs to be done!”

Shey walked me around the training facility - a large open concrete-floored room with agility supplies, leashes, and various furniture around. On the far side of the room, three giant garage doors open up to a one-acre fenced yard. He told me that they set up the training room differently based on the training session being taught. FVC offers three different group training classes for varying different training goals. They also offer private training and behavior consulting by appointment. Shey gave me the **Training Registration Form** document outlining the different sessions. The first training class is called “Basic Skills” and is geared toward puppies and rescue dogs with little to no training. This session requires registration and has a maximum of 10 dogs per session in order to give each owner/pup pair the attention needed. The second training class is “Walk-Train-Play” which offer leash training as well as socialization with other dogs. This class has no registration limit as it is seen as a “drop in” class for dogs to socialize. The third class is called “Off Leash Operation” for those who want voice and sight compliance for trail walks and large outdoor areas. This training consists of classroom and trail sessions to practice skills learned. A maximum of 5 dogs are allowed for this course as it generally requires more one-on-one work. The Basic Skills and Off Leash Operation courses are four weeks long (1 hour of class per week) with varying dates/times each month. The Walk-Train Pay course is a 1-hour session offered 14 times per week - one morning and one afternoon class each day. Private training sessions are by appointment.

I asked Shey how customers currently register for these classes. He grudgingly said that he wishes everything could be done through their website, but it currently has to be a mixture of interaction with the website and the receptionists. Training schedules are made by the trainers every month, and then posted to FVC’s website. Shey and Marie alter the times/dates for the training classes to provide a greater range of availability every month. Clients must fill out a **Patient Information Form** for their dog if they do not have a file with FVC already, and a **Training Registration Form** for the class. They can complete these either by coming into the office, or downloading the forms from the website and

faxing them to the office prior to the first training date. He told me that they don't have anything set up to where clients can register for classes through the website. He asked Danielle about it but they found it difficult to set up because there are limitations for how many spots are available in each class - which is reviewed by the receptionists. Shey expressed to me that he wants a more intelligent system that can automatically consider these restrictions and have clients simply choose the class/date and type in the "paperwork" requirements through the site.

Shey finished describing the training system and directed me to interview Paul for the logistics of how FVC handles kenneling.

Journal 4: Paul Brown - Kennel Admin

Today I shadowed Paul Brown around the kenneling facility of FVC. He began his day by giving me a tour of the facilities - complete with 20 dog kennels of varying sizes, a dog food and equipment storage room, and the play area/yard.

I asked Paul to describe how a customer would go about reserving a kennel for their dog. He told me that customers can book a kennel for an allotted period of time by calling/emailing of the receptionists and checking for availability. The receptionist will check for availability rummaging through the kenneling spreadsheets that display each kennel number and the date(s) it is reserved for. They will then discuss payments with the customer and mark a kennel as reserved. He expressed that this system usually works pretty well, but it is sometimes difficult to check when any kennel will be available without sifting through all 20-kennel booking information. He would prefer a way to view dates of available kennels in a calendar form.

I went on to question Paul about a typical day in the kenneling department. Paul explained to me that the kenneling job begins with letting all of the pups out to the yard at 8am, and filling the food bowls while they're out. One of the trainers will be monitoring the dogs in the fenced yard while Paul works on filling each food bowl. He makes sure to read the **Special Care Form** posted on each kennel that specify any dietary needs. Then, the kenneling staff will work on returning each dog to their kennel for breakfast. He explained that when each dog is dropped off for kenneling, the staff will attach a paw shaped plastic tag with their name and a number written on it to their collar. This helps the kenneling staff return the dogs to the correct kennels. After breakfast, the dogs relax in the kennels while Paul organizes kenneling equipment and cleans up dog droppings in the yard. At around noon, the dog walking shifts begin. Paul attempts to take 3-4 dogs walking at a time, and the Trainers will pitch in when available. He will then mark the walk log outside of each kennel to indicate which dogs have been walked. Early afternoon, the dogs will be let out to the yard to play. He expressed that the dogs are always monitored during group time, and any aggressive behavior will result in a dog's isolation from the group. He likes to separate the small and big dogs as much as possible to avoid injuries, so he usually lets the small dogs out to play first, kennels them, and then lets the big dogs out. The dogs will then get fed dinner before their final walk of the day around 6pm.

Journal 5: Aleksey Petrov - Assistant Vet Tech

Today I was able to shadow Aleksey and look into the day of an assistant vet tech. Aleksey's day begins by looking over the appointment details scheduled for the day and preparing any special equipment needed for the procedures scheduled. He mentioned that all of the vet medications and supplies are provided by a third-party company that comes in every week to check on stock. Fairbanks Veterinary Clinic makes monthly payments for this service on top of the cost of restocking.

Aleksey's main job is to work with the other assistant vet tech - Emily - to assist the primary Vet Tech - Brooks - in handling patient appointments. The veterinary wing of the office consists of four examination rooms, and one surgical room. For normal checkups and minor procedures, Aleksey (or Emily) will walk the client and patient into an examination room and do a basic health check on the dog. They record the dog's vitals and general health in the **Animal Record Form**, and then give it to Brooks before she does further examinations. Brooks will then review the form, conduct necessary further examinations, and address any owner concerns. The form is stored in the customer's folder for reference during future visits. Aleksey or Emily will prep dogs for procedures, administer shots/medications as needed, provide care instructions and prescriptions to the owners, as well as assist Brooks in any major surgical procedures.

Aleksey told me that they can often get by with only one vet tech assistant, but generally both assistants will work 40-hour weeks. In addition to conducting scheduled appointments, the vet team will provide medical care to any kennelled dogs at the facility that need it. However, they do not operate as an emergency care clinic to the public.

Journal 6: Jacob Carter - Groomer

Today, I was able to shadow FVC's only dog groomer. We began the day by chatting about his job and what got him started into the business. Jacob owns two standard poodles and one Norwich Terrier, and used to pay to have all three of them groomed every month. He noticed that his dogs got very nervous when being dropped off at the groomers, and clearly didn't enjoy the experience. As the grooming bills were seemingly endless, he decided to learn how to groom the dogs himself. He figured that his dogs would be more comfortable if they were groomed in their own home. He soon had an idea of a service that brings dog grooming to owners' own houses. He became a Mobile Dog Groomer and converted an old UHaul panel truck into a doggy spa. Jacob met Danielle and Paul in Houston and often brought his mobile grooming facilities to their home to groom all of their pups. When they opened the clinic and asked him to be a part time groomer, he was more than thrilled. He gets to choose his own hours and still run his mobile grooming business on the side. "I consider myself a freelance worker, but it is nice to not always be on the go."

We soon began touring the grooming facilities, which is on the bottom floor of the facility, next door to the kennels. Jacob showed me the two dog bathing stations, the supplies closet, and the grooming table.

I asked Jacob to describe to me the process of making appointments with him through the clinic. He told me that customers book groomings through our receptionists based on his schedule. He supplies

his schedule to Serina and Cody every two weeks so they can book grooming appointments. Bookings can be made as late as 24 hours in advance, and can be cancelled up to 24 hours before the appointment without charging penalties. Since he runs his own travelling grooming service on weekends and off hours, Jacob enjoys having a very organized schedule.

FVC provides grooming materials for Jacob, and pays him by the hour for grooming sessions registered through the clinic. Jacob is able to purchase his preferred grooming supplies and provide the receipts to Cody and Serena to get reimbursed.

To book with Jacob through FVC, the customer needs to have a file with the clinic with a client information form, general **Patient Information Form** for the dog, as well as fill out a **Grooming Consent & Release Form** to relieve the clinic of any accidental events that may happen during the grooming process.

Business Documents

Animal Record Form
Client Registration Form
Grooming Consent Form
Patient Information Form
Special Care Form
Training Registration Form



Animal Record Form

Name of Owner: _____ Contact Number: _____

Pet Information:

Name of Pet:	Breed:	Color/Markings:
Age or Birthday:	Gender:	Neutered/Spayed:

Vet Visit History:

Date	Weight	Temp	BP	Pulse	Respiration	Pain	Vet Initials

Immunization/Vaccine History

Date	Type	Next Due	Details

Known Conditions or Allergies

Name of Condition	Details/Notes

Surgical History

Date	Procedure	Details/Notes



Client Registration Form

Thank you for choosing Fairbanks Veterinary Clinic for your pet's medical needs. We pride ourselves in offering high quality medical care and emphasize preventive medicine. We look forward to serving you and caring for your pet's needs for many years to come. Please complete this form so we can accurately enter this information into our files. To open an account with us, you must be at least age 18 and provide a photo ID, such as driver's license or state I.D.

Full Legal Name:

(Name of Owner) PLEASE PRINT

Owner information:

Address:

City, State, Zip:

Phone #:

Secondary Phone #:

Date of Birth (must be over 18):

How do you plan to pay for today's services? Cash Check Credit Card (We accept Cash, Checks, and Credit Cards: Visa, MasterCard, Discover, and we offer Care Credit if you need a payment plan.)

How did you hear about our clinic? Referral Advertisement Yelp Other

EMERGENCY CONTACTS:

Please list two emergency contacts for your pet(s) in case we are unable to reach you:

Primary Contact Name:

Relationship to Owner:

Phone #:

Work Phone #:

Cell Phone/Pager #:

Secondary Contact Name:

Relationship to Owner:

Phone #:

Work Phone #:

Cell Phone/Pager #:

Please indicate how many pets you would like to register with FVC.

Notice: A Patient Information Form will need to be filled out for each pet prior to obtaining treatment/services.

TO VETERINARY STAFF

I hereby authorize the release of my pet's medical information to the appropriate professional staff. I give permission to the veterinarian to secure treatment for him/her and to order medications, injections, anesthesia, or surgery for my pet, in case of emergency.

CLIENT AGREEMENT

I hereby agree to adhere to the policies of FVC.

Signature

Date



Patient Information Form

Name of Owner: _____ Contact Number: _____

Pet Information:

Name of Pet:	Breed:	Color/Markings:
Age or Birthday:	Gender:	Neutered/Spayed:

Vaccination / Medical History:

(Please specify dates below)

DHPP: _____ Commonly known as a "Distemper Vaccine." Consists of Distemper, Hepatitis, Parvovirus and Parainfluenza inoculations.	Lepto: _____ Leptospirosis: May be given in conjunction with the Distemper vaccine or as a single annual vaccine when the DHPP is on a three-year schedule.	Bordetella: _____ Commonly known as "kennel cough." Grooming and kennel facilities are high-risk environments for these contagious organisms.
Rabies: _____ Vaccine can be on an annual or every three-year schedule. This vaccine is required by law.	Lyme: _____ Lyme Disease: An annual vaccine given to pets thought to be at risk for this disease.	Giardia: _____ A protozoal parasite. Also an annual vaccine given to pets thought to be at risk.
Fecal Exam: Negative / Positive (circle one) if positive, please specify _____	Heartworm Test: _____ Negative / Positive (circle one) Recommended annual blood test.	Other: _____ _____

Additional Information:

Is your pet on heartworm prevention? Yes No

If so, which kind? _____

What percentage of time does your pet spend outside? _____

Describe your pet's diet:

By signing below, you grant Fairbanks Veterinary Clinic permission to perform medical procedures on your pet, including administering medications and performing surgery.

Owner Signature

Date



Special Care Form

Kenneling Tag Number: _____

Pet Information:

Name of Pet:	Breed:	Color/Markings:
Age or Birthday:	Gender:	Neutered/Spayed:

Dietary Care Instructions

Additional Information
Please indicate any additional information our kenneling staff should know before caring for your pet:

Emergency Contacts

Please provide two emergency contacts for your pet in case we are unable to reach you:

Primary Contact Name:	Relationship to Owner:
Cellphone #:	Work Phone #:

Secondary Contact Name:	Relationship to Owner:
Cellphone #:	Work Phone #:



Training Registration Form

Name of Owner: _____ Contact Number: _____

Pet Information:

Name of Pet:	Breed:	Color/Markings:
Age or Birthday:	Gender:	Neutered/Spayed:

Group Classes Offered

- **Basic Skills (4 weeks x 1 hour/week):** geared toward puppies and rescue dogs with little to no training. These sessions include basic commands (sit, stay, come) as well as on-leash training. Various dates offered.
- **Walk-Train-Play (1 hour drop in):** provides leash training as well as socialization time with other dogs. Sessions offered morning & afternoon M-F.
- **Off Leash Operation (4 weeks x 1 hour/week):** designed for those who want voice and sight compliance for trail walks and large outdoor areas. This training consists of classroom and trail sessions to practice skills learned. Need prior basic skills training. Various dates offered.

Please refer to the FVC website for available training dates for the different training classes and specify your registration below. (Private lessons should be reserved separately through the front desk)

Course Registration	
<input type="checkbox"/> Basic Skills	Date(s) _____
<input type="checkbox"/> Walk-Train-Play	Date(s) _____
<input type="checkbox"/> Off Leash Operation	Date(s) _____

Class Cancellation Policies	
<p>Payment in full is required before service is provided. There is a \$25 charge for returned checks. Once purchased, classes are non-refundable and non-transferable. If we determine that it is in the best interest for the dog to seek Private training, then arrangement for private lessons will be made. Class fees may be pro-rated toward private lessons. If you decline private lessons, then your class fee will be forfeited.</p>	

Customer Agreement

By signing below, you agree to the cancellation policies of FVC Training Classes. You also agree that results of the training vary from pet to pet, and though the results described above for each class are common, they are not guaranteed.

-

Owner Signature

Date