



# Check In & Assess

A Practical Guide for Pet Professionals

*Protect Your Staff. Protect Your Business. Protect the Pet.*

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# How to Use This Guide

This guide was designed by Mary Oquendo. It is designed to help pet professionals build a consistent, thorough intake process that protects every animal in their care and protects their business from preventable problems.

## Goal

You will have the skills to successfully check in a pet that is safe to groom, and protect your business, your staff, and the pet from preventable problems.

## What This Guide Covers

1. Why a thorough check-in matters
2. The paperwork that protects you
3. How to conduct a hands-on assessment—head to tail
4. Knowing when to stop a groom
5. The check-out conversation

## Why It's Important

A thorough check-in is not a formality. It is your first line of defense. It protects the pet, it protects your staff, and it protects the business you've worked hard to build. Skipping it, even once, opens the door to liability, injury, and preventable loss.

### Protect Your Staff

Your team works hands-on with animals every day. A bite, a scratch, or an unexpected medical event during a groom can result in injury, workers' compensation claims, and lost productivity. A proper assessment before grooming begins gives your staff the information they need to work safely.

- Identify aggressive or fear-based behavior before restraint begins
- Know about existing injuries or conditions that affect handling
- Reduce the element of surprise, which is when accidents happen

### Protect Your Business

A thorough, documented check-in is your legal and professional paper trail. If a problem arises during or after a groom, illness, injury, a pre-existing condition, your documentation is your defense.

- Signed intake forms create a clear record of the pet's condition at drop-off
- Release forms establish what the client acknowledged and consented to
- Consistent protocols demonstrate professionalism and due diligence
- Documentation protects you in disputes, insurance claims, and legal situations

### Protect the Pet

You are the last line of defense for animals in your care. You may be the first professional to notice signs of illness, abuse, injury, or a condition the owner isn't aware of. A careful assessment gives you the information you need to groom safely, or to stop and refer.

- Detect pre-existing skin conditions, lumps, or injuries
- Identify signs of pain that affect how the pet tolerates grooming
- Recognize when a pet is medically unfit to be groomed that day

### Long-Term Benefits

Building a culture of thorough check-ins pays dividends over time. Clients learn to trust your process. Staff feel supported and informed. And you build a reputation as a professional who takes animal safety seriously.

- Reduces repeat incidents and liability exposure

- Builds client trust through transparency
- Creates a consistent standard across all staff
- Supports professional growth and documentation habits

# Paperwork

Paperwork is not bureaucracy. It is protection. Every form you use creates a documented record of what was agreed to, what was observed, and what was authorized. Without it, disputes become your word against the client's. Any paperwork that you have a client sign, *must* be reviewed by a business lawyer in your state to ensure that it is legal and enforceable.

## Releases

A release form communicates your policies and obtains the client's informed consent. It should be signed at or before the first appointment and updated whenever your policies change.

### ✓ Your Release Form Should Cover:

- Authorization to perform grooming services
- Acknowledgment of grooming risks (nicks, reactions, stress)
- Permission to seek emergency veterinary care if needed, and who is responsible for the cost
- Your policy on aggressive or dangerous animals
- Your cancellation and no-show policy
- Your photo/social media policy
- Your payment policy, including returned checks and chargebacks

### ✓ Pro Tip:

Have all new clients sign your release form before the first appointment, not at drop-off while they are distracted.

Keep digital or physical copies of signed forms for every client. You'll want them if a dispute arises months or years later.

Review your release form with an attorney familiar with your state's laws. What is enforceable varies by jurisdiction.

## Intake Form

The intake form is your appointment-by-appointment record. It documents the pet's condition at drop-off, the services requested, and any instructions or concerns noted by the owner.

### ✓ Your Intake Form Should Capture:

- Pet's name, breed, age, and weight
- Veterinarian name and contact number
- Vaccination status (required vaccines per your policy)
- Known health conditions, medications, or allergies

- ❑ Behavioral history: bites, aggression, fear, handling issues
- ❑ Services requested and any specific styling notes
- ❑ Coat condition at drop-off (matting, skin issues, parasites)
- ❑ Owner's authorization signature and date

✓ **Pro Tip:**

Update the intake form at every appointment. A dog's health and behavior can change significantly between visits.

If the owner notes a behavior history (biting, snapping), document it in writing and have them sign it. This protects you and informs your staff.

A groom card or digital equivalent that stays with the pet throughout the appointment keeps your whole team informed.

## Protocols

Protocols are your internal standards, the documented procedures your staff follows for check-in, assessment, handling, and check-out. They create consistency, support training, and protect you if a staff member is ever involved in an incident.

- Written protocols reduce reliance on memory and verbal instruction
- They create a defensible standard of care
- They make onboarding new staff faster and safer
- They demonstrate professionalism to clients and insurers

 **Note:**

Your protocols don't have to be elaborate. A clear, step-by-step checklist for each stage of the appointment is enough to start.

Post key protocols visibly in your grooming area so staff can reference them easily.

## The Assessment: Head to Tail

The hands-on assessment is the foundation of safe grooming. It begins before you ever pick up a tool. A systematic, head-to-tail approach ensures nothing is missed, and gives you documented evidence of the pet's condition at drop-off.



### Important:

Always conduct and document your assessment before the groom begins. Once the appointment starts, it's too late to capture a baseline.

## Before Hands-On Assessment

Before you touch the pet, take a moment to observe. Watch how the animal moves, how it holds itself, and how it responds to the environment. What you see before you touch is often as informative as what you feel.

### ✓ Visual Observation Checklist:

- How does the pet enter the salon? Willingly, hesitantly, or with resistance?
- Is the gait normal, or is there limping, stiffness, or favoring a limb?
- Is the pet alert and responsive, or lethargic and dull?
- Are there visible signs of injury, swelling, or discharge?
- Is breathing normal, or labored and rapid?
- Does the pet seem in pain when moving or when touched lightly?
- What is the overall body condition? Too thin, appropriate, overweight?

## Behavior Assessment

Understanding the pet's behavioral state before grooming begins is critical. A fearful, anxious, or aggressive pet requires a different approach than a relaxed one—and in some cases, requires a different plan altogether.

### Signs of a Calm Pet

- Loose, relaxed body posture
- Soft eyes, relaxed ears
- Accepts handling without pulling away
- Tail wagging loosely (dogs)
- Approaches staff willingly
- Responds normally to treats or praise

### Signs of Stress or Anxiety

- Tense, rigid body posture
- Whale eye (showing whites of eyes)
- Ears pinned flat or hyper-alert
- Trembling, panting, drooling excessively
- Growling, snapping, or lunging
- Attempting to escape or freeze

✓ **Pro Tip:**

Document the pet's behavioral state on the intake form at every appointment. Changes over time are meaningful.

A pet that has never been aggressive can change. Previous calm behavior does not guarantee safety today.

For known anxious pets, consider whether a fear-free approach, a shorter groom, or a vet consultation is appropriate before proceeding.

## Where We Start

Begin your physical assessment at the back of the pet and work forward. This approach is less threatening to the animal and allows them time to acclimate to your touch before you approach more sensitive areas like the head and face.

- Starting at the rear is less confrontational than approaching head-on
- It allows you to evaluate the body systematically
- You establish trust before reaching sensitive areas
- Any reactions (pain, aggression) are noticed before you are in a vulnerable position near the face

## Skin & Coat Assessment

The skin and coat are your most immediate window into a pet's overall health. A thorough evaluation reveals not just grooming needs, but potential medical concerns that require veterinary attention.

✓ **Skin & Coat Checklist:**

- Run your fingers through the coat, feel for mats, tangles, or foreign objects
- Part the coat and inspect the skin: look for redness, flaking, scaling, or rashes
- Check for external parasites: fleas, flea dirt, ticks, mites
- Note any lumps, bumps, cysts, or masses, document location and approximate size
- Look for signs of self-trauma: hot spots, hair loss, excessive scratching or chewing
- Assess coat density and condition: dry, brittle, oily, or normal
- Note any unusual odor from the coat or skin, as well as behavioral cues you are approaching a sensitive or painful area

⚠ **Report to the Owner:**

Any new lump, bump, or mass you feel during the assessment

Signs of external parasites

Hot spots or open sores

Unusual skin changes since the last appointment

Severe matting that will require a shave-down

## Head Assessment

Approach the head slowly and calmly. Many pets are more sensitive around the face and head than anywhere else on their body. Take your time, speak softly, and watch for stress signals.

### ✓ Head Checklist:

- Eyes: clear and bright? Look for redness, discharge, cloudiness, or asymmetry
- Ears: smell for odor (sign of infection), look for discharge, redness, or excess debris
- Nose: is it moist? Look for discharge, cracking, or discoloration
- Facial folds (brachycephalic breeds): check for moisture, redness, or odor between folds
- Reaction to touch: does the pet pull away, wince, or show pain when the head is handled?
- Hair around the eyes: note any staining or matting that affects vision

### ✓ Pro Tip:

Ear odor is one of the most reliable early indicators of infection. If you notice it, tell the owner at check-out. However, don't use the word infection, describe symptoms

Brachycephalic breeds (bulldogs, pugs, shih tzus, persians) require special attention during the assessment—and during the groom itself. Their anatomy makes them more vulnerable to respiratory distress.

Document eye or ear findings consistently. A change from appointment to appointment may indicate a developing problem.

## Gums & Teeth Assessment

A brief oral assessment is within the scope of a grooming check-in. You are not performing a dental evaluation—you are noting what you observe and communicating it to the owner.

### ✓ Gums & Teeth Checklist:

- Gum color: healthy gums are pink. Pale, white, blue, or bright red gums are medical emergencies
- Gum texture: moist and slick is normal. Tacky or dry gums may indicate dehydration
- Teeth: note obvious tartar buildup, broken teeth, or missing teeth
- Odor: significant bad breath may indicate dental disease or systemic illness
- Reaction: does the pet resist having the mouth area touched?

### 🚨 Important:

Pale, white, blue, gray, or bright red gums are a veterinary emergency. Do not proceed with the groom. Contact the owner immediately and recommend emergency vet care.

You are not diagnosing, you are observing and communicating. “I noticed X during our check-in, you may want to mention it to your vet” is always appropriate.

## Chest & Belly Assessment

The chest and belly are areas where significant findings are often missed. Many pets are sensitive here, and it's important to approach gently and watch for signs of pain or discomfort.

### ✓ Chest & Belly Checklist:

- Breathing: is it regular and unlabored? Note any wheezing, crackling, or rapid breathing
- Heart rate: can you feel an obvious heartbeat? Irregularities are worth noting
- Belly palpation: gently feel for distension, hardness, or sensitivity to touch
- Skin and coat on the underside: often reveals flea dirt, rashes, or matting not visible from the top
- Nipples and mammary area: note any swelling, discharge, or asymmetry
- Umbilical area: check for hernias, especially in puppies and kittens

### ⚠ Stop and Contact the Owner Immediately If:

The belly appears bloated or distended (possible bloat/GDV: emergency)  
The pet cries out or snaps when the belly is touched gently  
Breathing appears labored, rapid, or irregular  
Gum color is abnormal (see Gums & Teeth section)

## Legs & Paws Assessment

The legs and paws take significant wear, and are often where groomers encounter the most sensitivity. A careful assessment protects both the pet and your staff.

### ✓ Legs & Paws Checklist:

- Run your hand down each leg: feel for swelling, heat, or asymmetry
- Joints: gently flex each joint. Note any stiffness, resistance, or pain response
- Paw pads: look for cuts, cracking, growths, or foreign objects
- Between the toes: check for redness, swelling, discharge, or matting
- Nails: note length, condition, and whether any are broken, ingrown, or infected
- Dewclaws: check for overgrowth or ingrowth, particularly in older dogs
- Weight bearing: is the pet putting equal weight on all four limbs?

### ✓ Pro Tip:

Seniors and arthritic pets may resent having legs extended or held for nail trims. Adjust your technique and document the pet's limitations.

Overgrown or ingrown nails are painful. Photograph and document them before the groom begins so the owner cannot later claim they were caused during grooming.

Interdigital cysts or infections between the toes are common and often missed. Always check between the pads.

## Tail Assessment

The tail is often the last area evaluated and the first area where findings are dismissed. Don't rush it.

### ✓ Tail Checklist:

- Run your hand along the tail: feel for lumps, tender spots, or abnormal positioning
- Base of tail: check for matting, fecal soiling, or anal gland leakage
- Tail movement: does the pet wag freely, or does movement seem restricted or painful?
- Corkscrew or tight tails (bulldogs, pugs): check the skin fold beneath for moisture, odor, or infection
- Hairless or thin-coated areas: note any skin changes
- Docked tails: look for signs of chronic irritation at the dock site

# Know When to Stop

Knowing when to stop is not a failure. It is one of the most important skills a pet professional can develop. Your job is to provide safe, humane grooming, and sometimes the safest, most humane decision is to stop.

## Remember:

It is not your job to get bit.

It is not your job to groom a pet that is medically unsafe to groom.

It is not your job to continue a service that puts the pet, your staff, or yourself at risk.

## Signs It's Time to Stop

### Behavioral Reasons to Stop

- Pet has snapped, bitten, or escalated aggression
- Pet is in a full fear/panic state with no signs of settling
- Pet is self-harming (throwing itself, slamming into surfaces)
- Your staff feels unsafe continuing
- Pet cannot be safely restrained for necessary services

### Medical Reasons to Stop

- Labored, rapid, or noisy breathing
- Pale, white, blue, or bright red gum color
- Collapse, sudden weakness, or inability to stand
- Seizure activity
- Extreme distress with signs of cardiovascular compromise

## What to Do When You Stop

6. Stop the groom immediately and move the pet to a calm, safe area
7. If a medical emergency is suspected, contact the owner immediately and recommend emergency veterinary care
8. Document what occurred, the behavior or symptoms, the time, and the decision made
9. Photograph or note any relevant findings
10. Have a clear, compassionate conversation with the owner at pick-up
11. Note it in the pet's file so future appointments can be planned accordingly

## Pro Tip:

A pet that has had to be stopped mid-groom may need a veterinary clearance, a behavior modification plan, or vet-assisted sedation for future appointments. Communicate this clearly and document it.

Never make a client feel shamed or blamed for their pet's behavior or condition. Frame the conversation around safety and the pet's wellbeing.

Your safety and your staff's safety matter. If a pet is repeatedly unsafe to groom, it is appropriate to decline future appointments.

## The “No Groom Today” Conversation

Telling a client their pet cannot be groomed is uncomfortable—but necessary. Here is a framework for that conversation:

### Script:

“I want to be upfront with you about what happened today. [Pet's name] was showing signs of [describe: stress / aggression / pain / medical concern] during the appointment, and I made the decision to stop to keep [him/her/them] safe. I want to share what I observed with you so you can follow up with your vet.”

“I'd love to continue working with [pet's name]. Before the next appointment, I'd recommend [vet visit / behavioral consultation / sedation discussion with vet].”

## Check Out

The check-out conversation is as important as the check-in. It is your opportunity to communicate findings, reinforce your professional value, and set expectations for the next appointment. Done well, it builds client trust and loyalty.

### The Check-Out Conversation

Every check-out should follow a consistent structure. This ensures nothing is missed and gives the client a complete picture of their pet's appointment.

12. Report on the groom: what was done, how the pet did
13. Share any findings from the assessment: skin, coat, ears, gums, lumps, nails
14. Note any behavioral changes from previous appointments
15. Make any veterinary recommendations clearly and without alarm
16. Confirm next appointment or discuss a recommended schedule
17. Collect payment and provide a receipt or summary

### Communicating Findings

Many pet owners are grateful when a groomer notices something they've missed. Frame your findings as observations, not diagnoses, and always recommend the veterinarian for follow-up.

#### Scripts for Communicating Findings:

On a new lump: "I noticed a small lump on [location] during our assessment today. I'm not a vet, so I can't tell you what it is, but I'd recommend having your vet take a look at it at your next visit."

On ear odor: "I noticed a little odor in [pet's] ears today, which can sometimes be a sign of an early problem. It's worth mentioning to your vet."

On dental concerns: "I noticed some significant tartar buildup when I was working around [pet's] face. Your vet can advise you on whether a dental cleaning might be appropriate."

On matting: "The coat was more matted than last time, so we went a little shorter than usual to keep [pet's] skin from being pulled. Here's what I'd recommend to maintain the coat between appointments."

### Setting Maintenance Expectations

A brief maintenance coaching moment at check-out reduces coat problems, manages client expectations, and positions you as a trusted expert—not just a service provider.

- Recommend a brushing routine appropriate for the breed and coat type
- Suggest a realistic grooming schedule based on what you observed

- Explain the connection between at-home care and what's possible at their next appointment
- Offer to show them a brushing technique if time allows

✓ **Pro Tip:**

Clients who understand what you do and why are more likely to follow your recommendations—and less likely to be upset when things don't look exactly as expected. A simple printed or digital care card with their pet's recommended schedule and brushing tips adds perceived value and reduces surprises.

Document what you discussed at check-out. If a client later says they weren't warned about something, your notes protect you.

# Quick Reference: Full Assessment Checklist

Use this at every appointment. Initial each item as you complete it.

## Before You Begin

- Observed gait and movement at drop-off
- Assessed overall body condition and alertness
- Reviewed intake form and prior notes
- Noted client's instructions and concerns
- Vaccination records checked (per your policy)

## Behavior

- Overall demeanor: calm / anxious / fearful / aggressive
- Response to salon environment
- Response to initial handling
- Known behavioral history confirmed with client

## Skin & Coat

- Coat condition: mats / tangles / foreign objects
- Skin: redness / flaking / rashes / irritation
- External parasites: fleas / ticks / mites
- Lumps or masses: noted and documented
- Hot spots or self-trauma
- Coat odor

## Head

- Eyes: clear / discharge / redness / asymmetry
- Ears: odor / discharge / redness / debris
- Nose: condition / discharge
- Facial folds (if applicable): moisture / odor
- Reaction to head handling

## Gums & Teeth

- Gum color: PINK = normal. Pale / white / blue / red = EMERGENCY

- Gum texture: moist and slick = normal
- Teeth: tartar / broken / missing
- Breath odor

### Chest & Belly

- Breathing: regular and unlabored
- Belly: no distension / hardness / pain
- Skin and coat on underside
- Mammary area (if applicable)

### Legs & Paws

- Each leg: no swelling / heat / pain on flexion
- Paw pads: no cuts / cracking / growths
- Between toes: no redness / swelling / matting
- Nails: length / condition / ingrowth
- Dewclaws checked
- Weight-bearing: even on all limbs

### Tail

- Tail: no lumps / tenderness
- Base of tail: no matting / soiling / gland leakage
- Tail movement: free and comfortable
- Tail fold (if applicable): dry / clean

### Check Out

- Groom results communicated to owner
- All assessment findings shared with owner
- Veterinary recommendations made (if applicable)
- Maintenance and schedule recommendations given
- Next appointment confirmed or scheduled
- Payment collected

## A Final Word

The check-in and assessment process is one of the most powerful tools in your professional toolkit. It is how you catch the problems no one else sees. It is how you protect the animals who cannot speak for themselves. And it is how you demonstrate, every single day, that what you do is skilled, caring, professional work.

Build this process into every appointment. Document everything. Communicate clearly. And trust what you observe—because you've earned the expertise to see it.

### You've Got This

Every thorough check-in is an act of advocacy for the animals in your care. Your attention to detail protects them, your staff, and the business you've built.

Questions? Connect with Mary:  
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