

– JOB DESCRIPTION –

CLIENT SERVICES REPRESENTATIVE

INTRODUCTION

The purpose of Client Services Representative (CSR) is to serve as the first line of service at Highland Veterinary Clinic, to perform record keeping duties, to perform clerical duties related to patient care and treatment, and to provide miscellaneous support to the Hospital Administrator, Office Manager, and Veterinary Practice Manager. The Client Services Representative is under the direct supervision of the Office Manager. These service functions include, but are not limited to, reception (cyber, visitor, and telephone), maintenance of veterinary medical records, accounts maintenance, cash processing, data entry, word processing and direct-mail service. This position requires a practical knowledge of hospital organization and services, the basic rules and regulations governing visitors and animal patient treatment, data transcribing, word processing, and a practical knowledge of our standard procedures, veterinary records, and terminology used in the hospital.

PRIMARY JOB RESPONSIBILITIES

- Provide friendly, quality and compassionate client care to the patients and clients of Highland Veterinary Clinic.
- Receive incoming calls, screen those that are handled by other health care team members and take care of routine calls. The routine calls include those seeking information about veterinary services (“telephone shoppers”). Provide knowledgeable sub-professional advice concerning the care and treatment of animals.
- Utilize VINx applications and AVImark with proficiency for client communications and interactions, and to assist clients in managing their pet’s healthcare.
- Follow established hospital policies and procedures in referring clients for immediate treatment of their pets when requests are accompanied by complaints of acute symptoms. Determine nature of injury/illness and attempt to reassure distressed pet owners. Determine whether preventative screening, immunizations and/or tests are current. Recommend update of necessary screening, immunizations and/or tests to clients in a professional and educated manner.
- Schedule appointments, obtaining all necessary data concerning the patient and owner. Fully prepare all required forms in person or in advance when possible.
- Prepare to receive appointments by retrieving client records, preparing data in advance of clients’ arrival whenever possible. Prepare required forms such as new client form, patient intake, consent forms, treatment plans for elective services, payment agreements, etc. and obtain all necessary information.

- Check clients in - Greet clients in a professional, friendly, and hospitable manner.
- Financially discharge patients. Review charts of patients being discharged from the clinic for completeness of information, make follow up appointments, new appointments or note changes in patient status as necessary. Enter charges when needed and set up future reminders in system. Present clients with medications, instructions when requested by support staff or attending DVM.
- Assure that all financial obligations are met by owners. Collect client fees, make change, process credit card transactions and assist in making count of cash drawer, assist Office Manager in running end of day reports as assigned.
- Perform over-the-counter selling of specialty merchandise comprised of pet grooming aids and sundry retail veterinary items. Exercise technical knowledge of products sold and demonstrate sales' abilities. Explain and demonstrate products when needed, and answer questions concerning over-the-counter products purchase/ use.
- Fill veterinary prescription and non-prescription anti-parasitic treatments/medications with appropriate medication; provide routine instructions to owners concerning prescriptions for medications.
- Accept lab specimens from pet owners, who have collected them at home. Match patient record to the sample and submit samples to veterinarian's assistant, veterinary technician, or technicians assistant.
- Assist in the updating of client files; prepare and mail thank you cards, sympathy cards, and "welcome aboard" information. Assists in the collation of reminders. Follow-up with clients as assigned by the office or practice manager—mainly when the clinic records indicate a non-critical follow-up is due.
- As required, enter data into the AVImark computer system, retrieve and modify computerized records as assigned. Act with discretion as described by our Pet HAPA policy. The practice management software includes, but is not limited to, the following areas that are most relevant to this job description: such areas as call lists of patients for periodic notifications, receipt and/or invoicing to update medical/financial records; accounting to include the general ledger and client accounts receivable.
- Perform a variety of clerical duties, receiving, sorting, distributing mail, coordinating and sending mailings as assigned by the Office Manager, cleaning and organizing reception area, type memos, coordinate messages. Assist in the creation of an inventory needs list for pet store products, nutritional supplements, and anti-parasitics. Assist in the receiving, stocking and distribution of supplies upon arrival.
- Work well with all employees and ensure that your actions support the hospital's mission, the doctors, and the practice philosophy.

- Perform other duties as assigned.

CONTROLS OVER WORK

The receptionist works under the direct supervision of the Office Manager and/or Veterinary Practice Manager, who will indicate general assignments, limitations and priorities. Recurring assignments are performed independently. Deviations or unfamiliar situations are referred to the supervisor or Hospital Administrator. Completed work is reviewed for technical accuracy and compliance with established procedures.

SKILLS AND KNOWLEDGE

- Possession of strong organizational skills.
- Excellent verbal and written communication skills. Possesses exceptional interpersonal communication skills and a high emotional IQ.
- Knowledge of hospital procedures, policies, and operating instructions for making appointments, assembling patient medical records, recording test results, relaying information regarding patient's condition, and compiling and submitting data on patients treated.
- Knowledge of hospital procedures, policies, and operating instructions for accepting payment on behalf of the hospital and independent groomers. CSR'S possess an ability to communicate technical knowledge of CareCredit payment plans and systems to users and potential clients.
- Knowledge of the spelling and meaning of commonly used terminology of veterinary medicine to understand the meaning of treatments and recommendations, as well as patient condition, and to be able to retrieve and understand pertinent digital files and information in AVImark.
- Knowledge and enjoyment utilizing social media and applications such as PetSites and VINx desktop.
- Requires strong client service skills. Personal contacts are with pet owners affected by a variety of problems, visitors and other healthcare team members. Considerable tact and diplomacy is required. Must accurately relay pet family/guardian's account of the medical complaint(s) of the pet(s) involved to the healthcare team member who will be involved in treating the patient(s).
- Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.
- Ability to work independently on assigned tasks as well as to accept direction on given assignments.
- Knowledge of computers and relevant software applications including MS Office (Word) and Excel.

PHYSICAL EFFORT

- The physical demands described here are representative of those that must be met by an employee to successfully perform the primary functions of this job.
- Frequently position self and move about the reception area to file, use office machinery such as phone, fax machines and computer, and assist clients with merchandise.
- Coordinates self and mental focus sufficient to operate a multi-line phone system and computer system with ease, and under pressure.
- Frequently transports inventory to stock shelves. Frequently handling 25 pounds and occasionally handling up to 50 pounds.
- Often transports patients to weigh on scales.
- Frequently required to communicate with clients, team members and associates. Must be able to accept, relay and exchange accurate information.

WORK ENVIRONMENT

While performing the duties of this job, the employee is exposed to hazards associated with aggressive patients; hazards associated with infected animals and controlled substances; exposure to unpleasant odors and noises; exposure to bites, scratches and animal wastes; possible exposure to contagious diseases. Worker is exposed to a variety of species.

Note: When duties and responsibilities change, job description will be reviewed and subject to changes of business necessity.

ESSENTIAL FUNCTIONS

- Professionally administer all phone calls - answering client inquiries in a prompt and friendly manner, scheduling appointments, recording messages.
- Requires strong communication and client service skills. Considerable tact and diplomacy is required. Ability to greet clients in a professional, friendly, hospitable manner - check clients in, discharge patients.
- Collect client fees, post and record payments, make change, process credit card transactions and run end of day transactions.
- Input data into computer software system.
- Open and/or close practice.
- Perform a variety of clerical duties, mailings, cleaning, organizing reception area, type memos, correspondence, reports and other documents.

- Ability to multi-task.
- Regular attendance and timeliness are an essential function in order to fulfill the requirements of this position.
- Perform general physical activities that require bending, standing, stooping, moving from room to room, sit, talk, and listen; may be required to walk or stand for long periods of time; will use hands to manipulate, handle, or feel; will reach with hands and arms.
- The employee must be able to occasionally / frequently lift and/or move up to 25 pounds.