



WASHINGTON HEIGHTS
VETERINARY CLINIC

JOB DESCRIPTION: CLIENT SERVICE REPRESENTATIVE

POSITION SUMMARY

The purpose of this position is to ensure that client service excels at WHVC and clients always have a positive interaction with our hospital. The CSR is the first and last contact with the hospital and is key to creating lasting (positive) impressions. The responsibility of a CSR is to perform primarily clerical tasks related to animal care and to provide miscellaneous support to the veterinary practice manager and health care team. These service functions include, but are not limited to, reception (visitor and telephone), maintenance of veterinary medical records, accounts maintenance, cash processing, data entry, word processing, appointment scheduling, and 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 the standard procedures, veterinary records and terminology used in the hospital. The CSR must have exceptional communication skills (both verbal and written), computer literacy, ability to multi-task, friendly attitude, and confidence to deal with stressful situations.

MAJOR GOALS

- To be effective, polite, compassionate and helpful to all clients, at all times and under all circumstances.
- To keep the clinic organized to ensure a smooth and efficient hospital flow.
- To maximize clinic productivity through proper scheduling.
- Maintain up to date knowledge of preventative medications, standard veterinary procedures, basic diagnostic services, and vaccinations.

PRIMARY JOB RESPONSIBILITIES

Client Relations, Clerical: 80% -85%

- Provide friendly, quality client care to the patients and clients of Washington Heights Veterinary Clinic.
- Receive incoming calls, emails, Pet Portal & clinic App communications while making sure to respond promptly. Provide knowledgeable sub-professional advice concerning the care and treatment of animals. Know when to make "client communications" for client questions/concerns that should be addressed by a medical professional. Know how to screen calls and route appropriately.
- 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 immunizations and/or tests are current. Recommend update of necessary immunizations and/or tests to clients when applicable.
- Schedule appointments, obtaining all necessary data concerning the patient and owner. Prepare all required forms in advance when possible.
- Prepare to receive appointments by retrieving client records, preparing needed forms in advance of clients' arrival. Complete required forms such as new client form, patient visit form, client report, consent forms, estimates, payment agreements, etc. and obtain all necessary information.
- Schedule progress exams and enter callbacks at check-out, before client has left
- Prepare welcome packets for new clients/puppies/kittens
- Check clients in - Greet clients in a professional, friendly, hospitable manner.

- Discharge patients. Review charts of patients being discharged from the clinic for completeness of information, make new appointments or note changes in patient status as necessary. Enter charges and set up future reminders in system. Present clients with medications, discharge instructions, and doctor notes. Echo medical recommendations made by veterinarians when checking out clients.
- Perform over-the-counter selling of specialty merchandise comprised of pet grooming aids and sundry veterinary items. Exercise technical knowledge of products sold and demonstrate salesmanship abilities. Explain and demonstrate products, answer questions concerning products purchase/ use.
- Fill veterinary prescriptions with appropriate preventatives; provide routine instructions to owners concerning prescriptions for medications.
- Collect lab specimens from pet owners, match patient record to the sample and submit samples to veterinary technician or nurse.
- Assist in the updating of client files; prepare and address New Client, Surgery Confirmation/ Instruction, and Online Pharmacy emails. Follow-up with clients when clinic records indicate no recent visits.
- As required, enter data into the computer system, retrieve and modify computerized records. The practice management software includes, but is not limited to, such areas as reminder list of patients for periodic notifications, receipt and/or invoicing to update medical/financial records; client records, pet records, medical records; word processing to produce letters for general correspondence and special mailings to clients, etc.
- Perform a variety of clerical duties, receiving, sorting, distributing mail, sending out mailings, cleaning, organizing reception area, type memos, correspondence, reports and other documents. Assist in the ordering, receiving, stocking and distribution of supplies.
- Contact clients whose pets have lapsed
- Work well with all employees and ensure that your actions support the hospital, the doctors, and the practice philosophy.
- Perform other duties as assigned.

Financial: 15%-20%

- 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, run end of day transactions.
- Explain invoices to show value for care provided, stating all services and products provided before the total
- Refer clients to Care Credit when asked about payment plans
- Collect payment when services are rendered, including making change for cash payments, processing credit cards and getting proper identification when necessary
- Balance cash drawer three times daily and record any discrepancy; run end of day reports
- Know fees for routine services and how to communicate them emphasizing value

Other: 5% or less

- Clean up after pets' accidents in reception area, exterior sidewalks, and parking lot whenever possible
- Perform other duties as assigned.

CONTROLS OVER WORK

The CSR works under the direct supervision of the Client Service Manager/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. Completed work is reviewed for technical accuracy and compliance with established procedures.

REQUIRED EDUCATION, SKILLS, AND KNOWLEDGE

Education and Experience

- High school diploma or equivalent
- Customer service experience

Skills

- Possession of strong organizational skills.
- Excellent verbal and written communication skills. Possess exceptional interpersonal communication skills.
- 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 owner'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).
- Ability to work independently on assigned tasks as well as to accept direction on given assignments.
- Ability to foster positive work environment for colleagues and clients

Knowledge

- Knowledge of hospital procedures 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 the spelling and meaning of commonly used terminology of veterinary medicine to accurately record results of tests and file veterinary medical reports according to alpha, numeric or subject matter headings.
- Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.
- Knowledge of computers and relevant software applications including MS Office (Word).

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Amount of Time Spent on Task

Task	None	Less than 1/3	1/3 to 2/3	More than 2/3
Stand		X		
Walk			X	
Sit				X
Climb or balance		X		
Stoop, kneel, crouch, or crawl			X	
Talk or hear				X
Taste or smell		X		

The job requires the following lifting requirements and/or exerted force be performed on the job.

Amount of Time Spent on Lifting Amounts

Lifting Amount	None	Less than 1/3	1/3 to 2/3	More than 2/3
Up to 10 pounds			X	
Up to 25 pounds			X	
Up to 50 pounds			X	
Up to 100 pounds		X (with assistance)		
More than 100 pounds		X (with assistance)		

Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception and ability to adjust to focus.

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.

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 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 lift and/or move up to 50 pounds.