

## -JOB DESCRIPTION-

# Client Services Specialist

### ***Introduction:***

The purpose of this position is to serve as receptionist at the Smiths Station Animal Hospital, to perform record keeping duties, to perform clerical duties related to animal patient care and treatment, and to provide miscellaneous support to the Veterinary Practice Manager and the staff. 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.

### ***Minimum Qualifications:***

#### **Knowledge Of:**

- General office practices and procedures including filing systems; receptionist and telephone techniques

#### **Ability To:**

- Use a multiple line telephone.
- Greet clients and their pets graciously and recognize the responsibilities involved in responding to client questions.
- Keep accurate medical records, including client correspondence.
- Understand and carry out oral and written directions.
- Proficiently handle all forms of money.
- Maintain a neat professional appearance.
- Maintain a pleasant and cooperative relationship with fellow employees.

#### **Education:**

- Equivalent to completion of 12<sup>th</sup> grade.

#### **Experience:**

- At least two years recent experience in general office work with increasing responsibilities.
- Recent experience at a veterinary hospital is preferred.

### ***Major Goals:***

- To be efficient, very pleasant, courteous, polite, concerned, and helpful to all clients under all conditions and at all times.
- To see that the client leaves the office with another visit scheduled for their continued pet health care. Specifically, schedule a follow-up, recheck, or re-vaccination appointment or set up a reminder for future health care needs.
- To keep the office organized, ensuring a smooth and efficient client flow.
- To see that appointments remain on schedule by being totally familiar with times required for different procedures and problems and scheduling accordingly.

### ***Major Duties:***

- Follow employee general policies as outlined in the *Employee Handbook*.
- Receive all incoming phone calls.
- Schedule all appointments.
- Pull client/pet records for daily appointments and place in alphabetical order in designated area. Report may be printed from within the appointment scheduler program on the computer.
- Greet clients with a smile and try to address both client and pet by name. Establish the purpose of each visit.
- Determine the client flow (i.e., the order of the exam rooms, which clients are seen first).

- Update the existing medical file (i.e., reason for visit, necessary vaccines/tests or products dispensed) or collect sufficient information to prepare a new file.
- Be sure all routine procedures such as vaccinations, heartworm tests, etc. are up-to-date.
- Coordinate Client and Pet Flow:
  - Usher clients into exam room.
  - Be sure the exam room has been properly cleaned and deodorized. If not, do so immediately and/or use another room.
  - Weigh pet(s) and record in medical file. For larger pets, weigh pet in waiting area prior to entering exam room.
  - Place client/pet record in exam room door/wall holder and inform the doctor or staff member that a client is in the exam room.
  - Page a back-staff member to pick up pets for boarding, grooming, surgery, etc. so they can be taken to the appropriate ward.
  - Write up cage card.
  - If a back-staff member is not available for pet pick-up, weigh pet & take to appropriate ward, place cage card in cage holder, put pet belongings in appropriate place and place client/pet record, with weight recorded, in designated area.
  - Page back-staff to prepare/bring pets up for discharge in lobby.
  - Clients picking up pets who have had surgery or hospitalization should be placed in an exam room (if available) so the doctor or technician may go over discharge instructions, medications, etc.
  - Be sure personal property is returned to the client.
  - Counsel clients regarding pets condition, as recommended by doctors and staff (routine lab results, nutrition, dewormers, medications, flea treatments, etc.).
  - Provide clients with appropriate handout literature for the pet's medical condition, problem, nutrition, etc. Almost all clients should leave with some sort of literature.
  - **Promote sales of our products.**
  - Ask all clients: **"Do you have enough (flea supplies, preventatives, shampoos, etc.) to last until your next visit?"**
- Client Departure:
  - See that all clients have a reappointment for their continued pet health care.
  - Ask all clients if they have any questions or problems. Resolve all questions and problems.
  - Use common sense!
- Collecting After Visit:
  - Verify that all items on the fee sheet are entered into the computer invoice.
  - Ask client if everything was okay or if they have any questions.
  - If minor grumbling over charges – handle yourself. An example of an acceptable response might be, "Pets get the same good care, lab work, and medication as people...Good medicine isn't inexpensive.."
  - If major grumbling or you can't handle the situation, call the doctor or manager.
  - If unhappy with services/treatment, ascertain the problem and handle. If unable to do so, call the doctor or manager.
  - Never let a client leave the hospital without handling all negative situations.
  - Process client payments – i.e., cash drawer/credit card terminal and computer.
  - Review discharge information or handouts with client.
- Making Appointments:
  - Responsible for scheduling all appointments.
  - Try to make appointments as early in the day as possible.
  - Try to keep scheduled appointment times close together, rather than spaced out over longer periods of time (i.e. 2:00, 2:30, 3:00 rather than 2:00, 4:00, 5:00).
  - Try to make appointments during weekdays. Saturday fills up quickly.

- Clients that are no-shows are to be called 15-30 minutes after their scheduled appointment to see if they are on their way. If not, then reschedule an appointment.
- Be sure appointments are made with the proper staff member.
- Be sure reappointments are made.
- If with vaccinations, intestinal problems, or general illness, remind the client toward the end of the conversation to bring in a stool sample (i.e. in plastic bag/cup).
- Tell the client that their pet **“needs”** or **“is now overdue”** or **“it is very important.”** Convince the client to make the appointment. The client needs our services in order to keep their pet healthy and avoid future costs.
- If surgery is planned, remind client no food or water after 8:00 pm the night before.
- Medication and Records:
  - If pet is coming in from another doctor/hospital, or medication is involved, remind the client to bring any records, lab results, x-rays, medications, etc.
- Bathing/Grooming:
  - Check all reminders and inform clients of items that will have to be brought current (vaccines, routine tests, etc.) while pet is being bathed/groomed.
  - Get complete instructions on how they want the pet groomed along with a contact number if there are any questions.
  - Check for extensive matting or poor coat condition and if present, get accurate quote from groomer or manager.
- Boarding:
  - Check all reminders and inform clients of items that will have to be brought current (vaccines, routine tests, etc.) while boarding.
  - Ask client if they would like other non-required services while boarding (i.e. recommended bloodwork/ tests, check-up, etc.).
- Miscellaneous:
  - **Be sure all necessary release forms are signed/filled out completely.**
  - Try to insure that no client waits more than 10 minutes before being put in an exam room.
  - Hand out client questionnaires (i.e. sick pet), educational material (i.e. new puppy recommendations), suckers, coloring books, stickers, etc.
  - Monitor cleanliness of reception area, lobby and business office and clean if necessary.
  - Prepare weekly reminder cards.
  - Perform client call-backs according to established protocol.
  - Call & remind clients of scheduled appointments, surgeries, and grooms.
  - Maintain an accurate inventory of office supplies.
  - Restock retail areas (food, collars/leashes, shampoos, etc.).
  - Refill prescriptions in accordance with hospital policies and procedures.
  - Refile client/pet records and file medical reports into the appropriate client/pet record.
  - Print all necessary end-of-day reports, balance cash/check drawer, make daily deposit, post daily ledgers, batch credit card terminal and insure daily back-up (disc/tape) is performed.
  - Other related duties as assigned.