

# **Job Descriptions: Client Services**

**Job Title:** Client Care Specialist 1 (Receptionist Level 1)

## **General Description of Position:**

The Client Care Specialist (who is also called receptionist) is the customer-relations expert in the veterinary practice. They are the clients' first impression of the practice, on the phone or in person. Receptionists must possess strong organizational skills, excellent telephone and in-person communication skills, and the ability to remain calm under pressure. Receptionists must have compassion for animals and their owners and understand the stress that patients and clients endure.

Receptionists are responsible for greeting clients; differentiating routine cases from emergency cases; scheduling appointments; entering client, patient, and financial data into the computer; generating invoices and explaining them to clients; processing payments; and managing the retrieval and storage of medical records.

Receptionists should expect to spend nearly all of their workdays at the front desk. The position requires the completion of a high-school degree or further education, competence in the English language, patience, and a pleasant manner. Ideally, newly hired receptionists will possess computer skills and have had cashier and related front office work experience.

## **Job Requirements/Skills/Physical Demands:**

The position requires good client communication skills, knowledge of the S.O.A.P. medical reporting system, basic clerical skills, basic filing skills, and good customer relationship skills. Must be able to handle multitasking unrelated tasks simultaneously, such as the ability to juggle phones and clients at the same time. This position requires basic medical knowledge for products and services. This position has a weight lifting requirement of a minimum of 25 pounds and requires the applicant to follow ergonomic guidelines established by the safety manager.

**Place in Organization:** Owner: Hospital Manager: Client Care Team Leader: Exam Room Technician: **Client Care Specialist 3, 2, 1.**

**Direct Supervisor: Client Care Team Leader**

## **Essential Functions:**

### **General Knowledge:**

- Know the range of services the practice provides and the species it treats.
- Be reasonably familiar with breeds and coat colors.
- Follow OSHA standards. Be able to find Material Safety Data Sheets quickly.
- Know standard medical and business abbreviations.
- Use proper medical terminology when speaking and writing.

- Understand the life cycle and pathology of common parasites (intestinal parasites, heartworms, fleas, ticks), and know the names of most common preventatives, recommended treatments, and diagnostics.
- Know the policies regarding provision of veterinary care, treatment of stray animals, deposits for hospitalized patients, payments, credit, pet health insurance, and finance fees.

**General Abilities:**

- Always be in position and prepared to work by the start of each scheduled shift.
- Maintain accurate personal time cards.
- Perform job tasks efficiently without rushing.
- Handle stress and pressure with poise and tact.
- Show respect for clients, team members, and animals (alive or deceased) at all times.

**Clerical Duties:**

- Pull charts for incoming clients.
- Upon the client's arrival, mark the patient's medical record with the date and a brief synopsis of the reasons for the visit.
- Check for and enter phone, address, and email updates in clients' records.
- Check for and enter medical updates (spay/neuter status, immunization status, microchip number) in patients' medical records.
- Attach a travel or circle sheet marked with the patient's and client's names to the medical record of each arriving client.
- For patients that are being admitted, attach cage cards and completed client-consent or other forms to the medical record.
- Ensure that the cash register has sufficient change for each day's monetary transactions.
- Maintain strict confidentiality regarding clients and patients for whom the practice provides veterinary services.
- Count and record the cash in the drawer each morning and at shift changes.

**Client Service:**

- Cordially greet arriving clients and patients, and address each by name.
- While handling phone calls, acknowledge the arrival of people in the reception area with eye contact and/or a hand wave.
- Review consent forms with clients and have clients sign the forms. Check that the clients' signatures match the signatures on the records.
- Using reminder, recall-system, and outpatient-visit and patient-admission protocols, advise clients of recommended services for their pets.
- Explain special programs offered by the practice.
- Provide clients with accurate and thorough information about all over-the-counter products. Understand and explain internal- and external-parasite products as well as diets, dental products, and behavior management tools.

**Telephone Duties:**

- Call clients scheduled for the next day to remind them of their appointments, appointment times, and special instructions, such as the need for fasting or withholding or administering medications.
- Call clients on the callback lists to check on patients' well-being and answer questions.
- Call clients who missed appointments and reschedule their appointments.
- Schedule appointments for exams, rechecks, surgeries, medical procedures, boarding, and grooming.
- Provide basic pricing information to callers. Respond in a manner that encourages potential clients to visit the practice.
- Answer routine questions or refer callers to the appropriate colleagues.
- Receive and record prescription-refill requests.

#### **General Housekeeping:**

- Keep the reception area clean and organized by dusting, picking up trash, and organizing the work area.
- Clean urinary and fecal accidents in the waiting room immediately; check with doctors or technicians to see if they need samples for diagnostics before discarding them.
- Check public restroom(s) and clean them as needed. Restock toilet paper, paper towels, and hand soap as needed.
- Keep the entrance, stairs, and sidewalks clean, safe, and presentable.

#### **Medical Records Management:**

- Understand the medical-record filing system.
- Know all possible locations for storage of records of hospitalized patients.
- Properly use bins or slots assigned to doctors, staff, pharmacy, lab, and callbacks.
- Accurately file all paper medical records.
- Check for misfiled records and file them properly.
- Understand the definition of an "inactive" client or patient record. Every six months, remove or "purge" records of patients who meet the inactive status. Store these records numerically or alphabetically as directed.
- Retain a list of inactive clients, and know where inactive files are stored.

#### **Computer Based Tasks:**

- Properly use the doctor's identification to attribute work performed by various doctors to their production records.
- Print appointment, drop-off, and surgery schedules for each day.
- Add new clients and new patients into the computer system as appropriate.
- Print hard copies of forms for incoming clients whose pets will have anesthetic, surgical, dental, or medical procedures.
- Generate records of rabies immunizations for clients and town, city, and county officials.

#### **Work Environment:**

We are a small animal hospital and a fertility clinic. The work area will be primarily the front office computer station. The work area includes a computer terminal and telephone. As a

Client Care Specialist you are responsible for managing the clients at the check out counter and ensure their charge out process is timely and accurate.

**Continuing Education Requirements:**

4 hours of continuing education per year are required to maintain full time employment.

**Employment Status:**

Non-exempt position.