



Customer Service Representative Detailed Job Description

GENERAL INFORMATION:

A veterinary receptionist may also be identified as a client service representative (CSR) or client-relations specialists. At Harmony Veterinary Center they are the client's first impression of the practice, on the phone and in-person, and are often their last impression as well. Veterinary receptionists must possess strong organizational skills, excellent telephone and in-person communication skills and have the ability to remain calm under pressure. Veterinary receptionists must also have compassion for animals and their owners and understand the stress that patients and clients endure.

At Harmony Veterinary Center, veterinary receptionists must also deliver excellent client service, communication and satisfaction and advanced and compassionate customer care.

The Mission of Harmony Veterinary Center is to **"Enrich the Lives of Pets and People."** At Harmony Veterinary Center, we believe that the following are absolutely necessary for every team member to deliver to every client, every time:

- **Friendly Greeting;** immediately greet clients in a friendly and over---the---top manner; use the client's and/or pet's name in the greeting; bond with the client and effectively make small talk
- **Prompt Service;** offer service to the client as soon and as efficiently as possible; maintain efficiency in all aspects of client service
- **Advanced and Compassionate Care;** offer advanced and compassionate care as instructed by the responsible veterinarian; offer compassion and empathy to all clients and patients at all times
- **Clear Recommendations;** make clear recommendations as instructed by the responsible veterinarian and based on Harmony Veterinary Center's recommendations for canine and feline health and wellness care
- **Effective Communication;** effectively communicate the value of our services and provide recommended treatment plans and any other important information clearly and concisely to the client
- **Seamless Checkout;** all charges are to be immediately and thoroughly entered into the patient's medical record; all clients should be escorted to the reception area for the next available receptionist to check out.



- **Follow---Up Care;** every client should receive a follow---up call after their appointment; examples of follow up calls include post vaccination, labwork results, post anesthesia and any medical concerns
- **Professionalism;** Every team member contributes to the professional reputation of the practice and is expected to exhibit core competencies and qualities expected of a professional.
- **Servant Leadership;** a servant-leader focuses primarily on the growth and well-being of people and the communities to which they belong. Servant leadership seeks to involve others in decision making, is strongly based in ethical and caring behavior, that enhances the growth of the human animal bond while improving the caring and quality of life for the pet, the client and the practice.
- **Adherence to the Vision and Values** of Harmony Veterinary Center to Enrich the Lives of Pets and People

DUTIES, RESPONSIBILITIES AND SKILLS:

General Knowledge:

- Know and understand the range of services our practice provides and be familiar with the species we treat, including breeds and coat colors
- Follow OSHA standards and be able to find the *Material Safety Data Sheets (MSDS) Books* and *Harmony Veterinary Center's OSHA Book* quickly
- Know and use proper medical terminology and abbreviations when speaking and writing
- Competently speak and write the English language

General Tasks:

- Always arrive 10 minutes before scheduled time to work so that you will be in position and prepared to work at the start of each scheduled shift and maintain accurate personal time cards; clock out for any breaks, and take scheduled lunches
- Be willing and available to stay late or through breaks, when needed, to assist with emergency or critical-care patients
- Enter the practice through the front door at least once daily, so that you see what clients see; pick up trash or feces from the parking lot, sidewalks, or entryway, as needed
- Maintain a professional appearance while at work, clean and non-wrinkled uniforms
- Change clothes during shifts as necessary to look professional and avoid carrying odors
- Promote a positive attitude among staff; smile and maintain an even, friendly demeanor while on the job and handle stress and pressure with poise and tact
- Perform job tasks efficiently and effectively without rushing; be detail oriented and exact
- Show respect for clients, team members, and animals (alive or deceased) at all times



- Have the physical strength and ability to stand for an entire shift when needed; be able to lift pets and objects weighing up to 40 pounds without assistance and ask for assistance in lifting patients weighing more than 40 pounds
- Maintain a list of tasks and engage in productive work, such as cleaning and organizing or completing a task in your area of responsibility during slow periods
- Assist other employees as needed; avoid waiting for coworkers to ask for assistance
- Participate in your performance appraisal, and, as requested, in those of others
- Participate in all staff meetings and training meetings
- Keep up with new developments in the field by reading journals and attending continuing education; attend off-site CE as required by the practice manager
- Maintain constant vigilance regarding open doorways that could allow pets to escape from the facility and always use hospital slip leads when escorting pets - never rely on client's leash
- Maintain strict confidentiality regarding clients and patients for whom the practice provides veterinary services and always record client services, communications and conversations
- Be prepared to handle any pet or facility emergency that may arise, including dog or cat fights, choking or strangulating animals, and facility fire or weather-related emergencies; be prepared to follow the OSHA emergency action and/or contingency plans
- Follow established facility closing procedures to ensure the security of patients, staff, data, revenue, inventory, and the building

Client-Interaction Tasks:

Face to Face Client Interactions Tasks:

- Anticipate who is coming into the building so we can address our clients properly; utilize an over-the-top greeting; bond with the client; point out something nice about the client and/or pet
- While on the phone in the reception area, acknowledge the arrival of clients in the reception area with eye contact, a smile and/or hand wave; always make sure to smile while on the phone, clients can hear the difference in your voice
- Use patients' names during conversations with clients about their pets; know each patient's sex so the pet can be called "he" or "she"
- Using the patient reminder system in Ezyvet and Harmony Veterinary Center's recommendations for health and wellness and advised clients of the recommended services for their pets; understand and inform clients of the value in the services we provide and recommend
- Understand, be able to explain and show clients the value of our services, recommendations and wellness plans for puppies, kittens, adults and seniors
- Be able to accurately provide, show the value and explain estimates for spaying, neutering, dental cleaning and wellness plans for puppies, kittens, adults and seniors



- Provide clients with accurate and thorough information about all over-the-counter and prescription products; understand and explain internal and external parasite products; understand and explain prescription diets and dental home care products; refer product questions you are unable to fully or accurately answer to the appropriate veterinary technician or veterinarian
- Explain delays to clients; ensure the comfort of clients and patients during their waits by offering fresh water and conversing; placate clients distressed by long waits, scheduling glitches and other problems
- Escort clients and patients to clean, empty exam rooms free of persistent or offensive odors
- Follow isolation procedures when greeting clients with contagious or potentially contagious patients, clients are informed that they must wait inside of their vehicle until an examination room is available and then these animals must be brought into an exam room with an exterior door; if no outside entrance exam room is available and the pet must come through the lobby, an appropriate team member will disinfect the lobby as soon as the contagious animal is in the examination room
- Assist client with unruly or unrestrained pets; ensure that all dogs are leashed and that cats and smaller pets are caged; isolate aggressive pets and provide crowd control; request assistance from veterinary technicians and veterinary assistants as needed
- Monitor patient's behaviors and note potentially aggressive behaviors; use caution when handling aggressive or potentially aggressive pets; request assistance when needed from the veterinary technicians and/or veterinary assistants
- Handle angry or grieving clients in a calm, reassuring manner; escort complaining or angry clients from the reception area to a separate, closed room where their complaints may be heard privately; when necessary enlist the veterinary practice manager or the office manager to resolve the complaint
- Provide basic grief counseling; always be sensitive to background chatter or conversations that could exacerbate the anxieties and grief clients experience during the euthanasia or death of their pet; provide clients with information regarding options available for the remains of deceased pets such as return of ashes, memorial rock or specialized urn.
- Always assist clients to their vehicles when needed, especially for clients with large items, unruly pets and/or small children

Phone Interactions Tasks:

- Know phone functions including hold, intercom, transfer, forward and three-way calling
- Answer the phone by the second ring and use the recommended greeting " Thank you for calling Harmony Veterinary Center, this is (your name) speaking, how may I help you?"; follow all written scripts
- Always make sure to smile while on the phone, our clients can hear the difference in your voice
- Manage multiple phone lines effectively; prioritize phone calls
- Use clients' and patients' names during conversations with clients about their pets; know each patient's sex so that the pet can be called "he " or "she"



- Possess sufficient knowledge of animal husbandry and basic medicine to answer routine questions or refer calls to appropriate colleagues
- Schedule appointments for examinations, rechecks, admits, Urgent Cares, surgeries, medical procedures; understand what is an emergency and schedule appropriately; schedule euthanasia procedures to maximize the comfort of clients and patients while allowing the practice to run efficiently
- Always obtain appropriate information from current clients when scheduling appointments, including client's and patient's name; reason for visit and if there are any other needed services
- Always obtain appropriate information from new clients when scheduling appointments, including client's first and last name; patient's name; patient's breed, sex and age; reason for visit; any other services that are needed; phone number and the name of any facility that may have previous records; always contact the facility before the appointment time so that records are available for review and can be entered into the computer system in a timely manner
- Provide basic pricing information to phone shoppers; respond in a manner that encourages potential clients to visit the practice
- Be able to accurately provide, show the value and explain estimates for spaying, neutering, dental cleaning and wellness plans for puppies, kittens, adults and seniors
- Accept phone call requests and faxed requests for prescription refills; advise clients of our 24 hour prescription refill policy timeframe
- Transfer calls to the answering service or set the answering machine to accept calls during team meetings and hours during which the practice is closed; stop transfer of calls to the answering service or turn off the answering machine when team members are available to receive calls
- Be able to transcribe messages from the answering machine and distribute messages appropriately
- When taking messages from clients or other parties, always make sure to receive a full name, the nature of the call and a number they can be reached at; advise clients or other parties of the appropriate wait times for return calls by the veterinary technicians, veterinary assistants, veterinarians, veterinary practice office manager and veterinary practice manager; notify recipients of urgent messages immediately
- Call clients scheduled for the next day to remind them of their appointment, appointment times and special instructions such as the need for fasting or withhold or administering medications
- Utilize the follow-up list in Ezyvet to call clients to check on patients after vaccinations and to schedule appointments for rechecks, lab work etc.
- Call clients who missed their appointments 15 minutes after the scheduled appointment time to check their status; if unable to contact them, call the next day to reschedule their appointment

Veterinarian, Veterinary Technician and Veterinary Assistant Support Tasks:

- Seek the assistance of veterinarians or veterinary technicians immediately when assessing potentially critical patients and/or work-ins to assess their ability to wait



- Inform the veterinary technicians when appointments are ready to ensure that the veterinarians and veterinary technicians enter the examination rooms within reasonable time periods
- Obtain current patient-status reports or updates from the veterinarians, veterinary technicians and/or veterinary assistants
- Inform the OSHA Coordinator, practice manager and/or responsible veterinarian or all bite/scratch wounds or any other injuries that you suffer so that reports can be made and you can be referred for timely medical care by a physician, if necessary; clean all wounds quickly and thoroughly; do the same for any client and recommend that they see their physician
- Assist in cleaning and preparing rooms for next client
- Assist in general cleaning and laundry
- Assist in animal handling and safety as required and requested.
- Coordinate appointment schedule to keep it flowing on time including expediting patient flow or calling clients to move back or reschedule if DVM is running over 20 minutes late.

Medical-Record Management Tasks:

Daily Medical-Record Preparation Tasks

- Always contact previous facilities for records before the appointment time so that the records are available for review and can be updated in the computer system including sterilization status, vaccination status, heartworm test status and all other wellness services
- Upon the client's arrival, load rooms in an efficient and timely manner; client wait times should be minimized and practice productivity should be maximized; one doctor should have no more than two appointments loaded at one time; work-ins should be loaded in-between scheduled appointments or in accordance with the admit/urgent care DVM for the day
- Check for and enter or update phone numbers, address and email in client's records

Medical-Record Filing Tasks:

- Understand the medical record system and accurately scan all paper medical records into the medical record in Ezyvet in the appropriate location
- Locate medical records for hospitalized, surgical or incoming patients
- Record all notes in the patients' computer records; record and initial all client services, communications and conversations, whether in-person or on the phone, especially when concerning a medical condition; place notes in the computer as a "follow-up", "in-clinic communication" or "phone call communication"; place another follow-up in the computer system if the client is worried or has any concerns or if the patient is not 100%



- Check patient and client files for completeness of notes, charges, follow-ups and reminders in the computer; make entries as needed in the computer record; the computer record is a legal medical record and they need to be treated as such
- Understand the definition of an “inactive” client or patient record

Reception-Area Housekeeping Tasks:

- Keep the reception area desks cleaned and organized; maintain a professional and neat appearance of the reception area at all times
- Keep water available for clients; offer water to all clients during their wait
- Turn on the sound system at the beginning of the day and turn it off at the end of the day
- Water, feed and maintain any plants in the reception area so that they are vibrant and add to the professional appearance of the reception area
- Water, feed, medicate clinic cats in the morning after arriving and evening prior to departing
- Place mats on the floor and towels by the door during rainy/snow days to prevent clients and patients from slipping and to minimize the tracking of water and mud

Supplies-Management Tasks:

- Sign off on deliveries and notify the appropriate person that deliveries are present
- Manage inventory for the reception area and all hospital common areas. Please supplies needed to be ordered on the want list.

Other Reception-Area Tasks:

- Maintain a file of lost and found pets; work with clients and HomeAgain and Microchip company to ensure that accuracy of this file and to assist in reuniting lost pets with their owners
- Maintain a phone and address list of local resources for training, boarding and grooming, as well as animal control officers, animal inspectors, city officials, state officials, veterinary medical association contacts and other professional contacts
- Maintain accuracy of clinic resource page on Harmonyvetcenter.com
- Set up referral appointments as recommended by the responsible veterinarian and complete all of the necessary paperwork, including the faxing/scanning/emailing of medical records in a timely manner
- Label and mail monthly service reminders in a timely manner as directed by the practice manager or CSR department head.



- Be prepared to handle medical emergencies at all times; recognize the symptoms of patients and clients in crisis; alert veterinarians and veterinary technicians to emergency situations; prepare rooms for incoming emergencies as needed
- Supply rabies certificates and appropriate application paperwork based on county
- Supply City of Arvada licenses and paperwork.
- Send correspondence, including thank-you notes, condolence cards and welcome cards to clients in a timely manner; ensure that cards have appropriate signatures

Computer Tasks:

General Computer Tasks:

- Use your own personal password to enter the Ezyvet software and signify your work
- Properly use the doctor's identification to attribute work performed by various doctors to their production records.
- Use the Ezyvet software to check clients in before services and out after services are completed; to ensure that appropriate charges are in the system, client should only be checked out after the responsible veterinary technician approves all charges and notates whether a recheck appointment is needed; the veterinary receptionist should schedule appropriate recheck appointments before the client leaves the building or provide a follow-up call within the next several days to schedule
- Add new clients and/or new patients into the computer system as appropriate; inactivate clients or patients in the computer system as appropriate
- Always contact previous facilities for previous records before the appointment time so that the records are available for review and can be updated in the computer system including sterilization status, vaccination status, heartworm test status and all other wellness services and can be entered into the computer in a timely manner
- Input appropriate reminders and follow-ups into the computer system

Word-Processing Tasks:

- Know the word-processing program sufficiently to draft letters and print forms and letters, as needed
- Print hard copies of forms for incoming clients and patients who will have anesthetic, surgical, dental or medical procedures, such as anesthesia consent forms, admit forms and tech sheets, as needed
- Produce vaccination, health and sterilization certificates as needed



Report-Generation Tasks:

- Run and print as needed CSR tracking reports, Tally handwritten weekly reporting sheets and turn into CSR department head
- Create a daily follow-up list and transfer them to the person responsible for those calls; call clients to remind them of services due, recheck appointments and needed lab work.
- Generate end-of-day reports, end-of-month reports and end-of-year reports
- Search for, save and print special lists from the database, such as patients that are overdue for services, new patients and /or new clients per month

Cash-Management Tasks:

- Ensure that the cash register has sufficient change for each day's monetary transactions; change money at the bank as necessary
- Count and record the cash in the drawer each morning, at shift changes and each evening at closing; reduce the drawer to the starting amount of cash

Daily Closing Financial Tasks:

- Prepare bank deposits and deliver the deposits to the bank on a daily basis
- Balance the daily and monthly revenue records against check deposits and cash and credit card receipts; check math for accuracy
- Match each day's monetary intake (cash, checks and credit card receipts) with the computerized daily summary sheet or invoices

Payment-Processing Tasks:

- Correctly apply discounts for employees, shelters, multiple pets and other discount classes
- Process clients' cash; credit card including Visa, MasterCard, American Express, Discover; debit card and check payments
- Process and assist clients in completing CareCredit applications
- Accurately record all payments in client and patient accounting records and give accurate change
- Ensure that checks have proper identifying information recorded on them (driver's license number), that checks are dated and signed and that clients have provided you with and you have reviewed proper corroborating identification
- Check that clients' signatures on credit card receipts match those on their credit cards or their photo identification



- Complete and/or file pet health insurance claims for patient services on behalf of clients as directed by the practice manager or responsible veterinarian
- Provide clients with emailed (printed upon request) receipts and itemized invoices of their transactions; be able to accurately review itemized entries on invoices with clients at the time of payment and answer any questions regarding charges or refer the questions to the responsible veterinary technician

Tasks Related to Incomplete Payments:

- Properly record and file deferred payments; record returned checks and adjust the client's account to reflect a returned-check fee; issue update invoices to clients, including appropriate finance charges and show accurate balances due on their account; search for and refer delinquent accounts to a collection service as directed by the practice manager
- Properly record and complete payment plan documentation and provide it to the office manager immediately.