

JOB DESCRIPTION
CLIENT SERVICES REPRESENTATIVE

REPORTS TO: Lead CSR and Client Service Director

POSITION OVERVIEW

The CSR is the client's first contact when calling or visiting the practice and as such represents the professional image of the practice to callers and visitors. The CSR answers telephones, greets clients, prepares patient files and escorts clients and patients to exam rooms, receives and relays client correspondence, updates client financial records. The exceptional CSR has the ability to diffuse negative client situations and foster client bonding.

POSITION REQUIREMENTS

EDUCATION AND LICENSURE REQUIREMENTS

- High school diploma or equivalent.
- Customer Service background desirable but not required.
- Typing skills required.
- Some computer knowledge required; comfortable with Word, keyboarding, and use of communication tools such as Instant Messenger and email.

EXPERIENCE REQUIREMENTS

- Significant experience with basic office functions in a busy office environment.
- Previous CSR and veterinary practice experience are desirable but not required.

PERSONAL REQUIREMENTS

The CSR must be able to:

- Be flexible in attitude and work habits.
- Quickly learn how to pronounce, know the meaning of and spell commonly used veterinary terms.
- Perform basic computer skills, type 30 words per minute.
- **Physical Effort:** Work requires lifting and carrying records and equipment weighing up to 25 lbs; requires sitting and standing for extended periods or time.
- **Working conditions:** May be exposed to unpleasant odors, noises and animal feces. May be exposed to bites, scratches and contagious diseases.

PERFORMANCE EXPECTATIONS

Veterinary Knowledge / Client Education

- Can answer client's inquiries about basic animal care questions and routine procedures.

- Can educate clients on over-the-counter products such as shampoos and nutraceuticals; has full knowledge of heartworm and external parasite preventives to promote client education and sales.
- Can guide client' to make appropriate decisions regarding optimum pet care.

Admitting / Discharging Patients/ Cash Handling

- Can admit patients and handle medical records entries accurately.
- Can prepare health certificates, immunization certificates, laboratory requests, and euthanasia certificates.
- Can handle client/patient transfers with ease.
- Can prepare client invoices for services performed.
- Can accurately handle payment transactions.
- Can accurately and empathetically communicate estimates/treatment plans to clients.

Hospitality

- Can bond with clients during interactions.
- Can keep the front desk a positive area even in the event there is a client wait time.

Schedule Management

- Can work to maintain an effective veterinarian appointment schedule, screening emergencies and prioritizing cases that need to be seen.

Computer Knowledge / Telephone Skills

- Receives and relays telephone, fax, and email messages accurately and promptly.
- Answers telephones and handle calls quickly, efficiently and in a professional and friendly manner using a multi-line system.
- Can enter and update client and patient information into practice computer software.
- Has good computer skills and shows accuracy in inputting details.

Personal Conduct/Attitude/Teamwork

- Can maintain positive, cooperative relationships with other employees.
- Can display tact and respect with team members even when busy or hectic.
- Feel and express a genuine liking for animals and their owners and for working in an animal care field.

Client Communication

- Can conduct oneself in a confident and professional manner with clients even when situations are stressful and/or focused on individual tasks.
- Can deal intelligibly, pleasantly and efficiently with clients, often doing several things at one time.
- Can greet clients with poise and natural effort.
- Can outline costs and fees in a positive light while supporting hospital payment policies.

- Can turn future clients (phone-shoppers) into clients through relationship building and bonding.
- Can easily remember clients and patients names and uses them.
- Can handle client correspondence including procedure reminders, thank you cards, welcome cards, sympathy arrangements and cards, and A/R statements.

Facility Maintenance

- Can maintain a professional/welcoming appearance of the front office through cleaning and organization.
- Can offer proper upkeep for and troubleshoot office equipment including pc's, telephones, copiers, and fax machines.

Recordkeeping/Filing

- Can accurately maintain an alphabetical filing system.

Organization/Time Management

- Can work almost constantly in the presence of other staff members and clients.
- Understands and carries out oral and written directions.

Other

- Performs other duties as assigned.