

## Customer Service Representative

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### **INTRODUCTION**

The purpose of this position is to serve as CSR at Kulshan Veterinary 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 staff. This position requires a practical knowledge of hospital organization and services, the basic rules and regulations governing visitors and animal patient treatment, data entry, word processing, mail service, and a practical knowledge of the standard procedures, veterinary records and terminology used in the hospital.

### **Primary Job Responsibilities**

- ***Management reserves the right to assign varied job tasks to any employee.***
- Open the practice and set up for the morning as directed, outlined in the daily checklist.
- Clean and maintain the public areas of the practice including the front desk, reception area, waiting area, public bathroom and exam rooms.
- Welcome clients and patients to the practice and provide for their comfort while they are in the practice. This includes greeting clients, offering coffee, showing them to waiting area, etc.
- Answer incoming telephone calls utilizing proper telephone etiquette. Screen those calls that are handled by other staff members and take care of routine calls. Routine calls include those seeking information about veterinary services. Provide knowledgeable advice concerning the care and treatment of animals including questions regarding hospital services, fees, animal care and treatment in accordance with hospital policies. Appropriately direct other questions and communication to a veterinarian, practice manager, or other staff members.
- Prepare to receive appointments by retrieving client records and preparing needed forms in advance of clients' arrival. Prepare outgoing on-site appointment information for doctors and staff prior to their departure (where applicable). Complete required forms such as new client form, pet information form, consent forms, border admission forms, held check agreements, etc. and obtain all necessary information.
- Handle patient emergency situations by following established clinic policies and procedures in referring clients for immediate treatment of their animals when requests are accompanied by complaints of acute symptoms. Determine nature of injury/illness and attempt to reassure distressed clients.
- Follow hospital policies regarding patient admittance. Determine whether immunizations/tests are current. Recommend update of necessary immunizations/tests to clients.
- Notify doctors of patient arrival. Relay all necessary information to the doctors, technicians and assistants.
- Present clients with medications, supplies, instructions, new client kits and any other items to take home.

- Review the services that were rendered to the patient (verbally itemize the client receipt) and inform client of the total amount due. Assure that clients meet all financial obligations or that acceptable arrangements have been made with business office personnel.
- Accept payments from the client. Accurately process cash, checks, charge card payments and credit account payments.
- Schedule appointments for the clinic after obtaining all necessary data concerning the animal and client. Prepare all required forms such as animal clinical records, health certificates, immunization certificates, lab reports and euthanasia certificates in advance, if possible.
- Perform over the counter selling of pet foods and supplies. Exercise a technical knowledge of products sold.
- Scan records and file in appropriate patient files.
- Enter data into the computer system and/or manual appointment books as required. Retrieve and modify stored records. Assist in the updating of client/patient files as needed including name, address, telephone numbers and vaccination history.
- Retrieve and re-file medical records accurately and promptly.
- Perform an end of day procedure each evening as outlined in the daily checklist. This would include forwarding the phones to the answering service, securing and locking all doors, assembling cash and receipt envelopes.
- Follow all hospital regulations in regards to general safety, hazard communications, emergency action plans, Personal Protective Equipment (PPE), and ergonomics as outlined in the Employee Handbook and safety manuals.
- Ability to lift up to 50 pounds.
- Assist with staff training and setting a positive tone for each day.
- Weekly, check medication refills to verify client pick-up. When applicable, contact client, return medications to pharmacy if not to be picked up and credit client account accordingly. Helping to keep refills current and timely.
- Review and send client communication for celebrations, sympathy, etc.
- Act as a resource for staff and clients on product knowledge.
- Immediately report any illegal and/or threatening activity to practice manager. Immediately report any safety issues to practice manager.
- Maintain strict confidence regarding issues discussed with owners and/or practice manager.
- Performs other duties as assigned.

### **CONTROLS OVER WORK**

The CSR works under the direct supervision of the CSR Coordinator who will indicate and oversee general assignments, limitations and priorities. Recurring assignments are performed independently. Deviations or unfamiliar situations are referred to the practice manager. Completed work is reviewed for technical accuracy and compliance with established procedures.

### ***OTHER SIGNIFICANT FACTS***

Skills and 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 as 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.

Personal contacts are with animal clients affected by a variety of problems, visitors and other staff members. Considerable tact and diplomacy is required. Must accurately relay client's opinion on the medical complaint(s) of the animal(s) involved to the staff members who will be involved in treating the patient(s).