



# WALNUT CREEK

## VETERINARY CLINIC

### **Job Description: Client Care Specialist**

#### **Position Summary**

A Client Care Specialist focuses on client service and communication. He or she is the first and last contact with the hospital and key to creating first and lasting impressions. The CCS must have exceptional client service and communication skills, computer literacy, handle payment and financial issues, ability to multi-task, friendly attitude in person and on the phone, and confidence to deal with stressful situations. CCSs support veterinarians, technicians, veterinary assistants, and groomers in daily patient and client care. CCSs communicate with clients in person and by phone, text, and e-mail. Professional attire, a name tag, and a groomed appearance are necessary.

**Performance Attributes** are vital to the success of the individual and practice, all staff members should have or develop: Speed, Efficiency, Accuracy, Reliability, Cooperation, Compliance, Clinic Awareness and Energy.

Reports to: Clinic Manager, Practice Administrator, Director of Operations, Veterinarians, Chiefs of Staff, Practice owner (s)

#### **Job Responsibilities**

##### **Client Relations Duties, 80%:**

- Greet pets **by name**
- Answer phones promptly and professionally using a multi-line phone system
- Screen and route calls to appropriate staff
- Provide phone shoppers with descriptions of services first, price last
- Receive and transmit faxes and emails, and scan documents, entering them in the appropriate medical page of Shared Folder.
- Take and deliver messages promptly to appropriate staff, attaching to medical records of patients so staff can properly document information
- Note in medical records the details discussed during client conversations including the date, time, key points of the discussion and any action required
- Ensure the reception area and exam rooms are clean and odor free
- Check medical records for accurate client addresses, phone numbers and e-mails, spelling matters!!
- Weigh pets each visit and record weights in medical records in computer
- Schedule appointments and surgeries according to hospital scheduling guidelines
- Make surgery and appointment confirmations calls
- Answer clients' questions about veterinary services and products and provide knowledgeable advice about wellness, prevention and diseases

- When dispensing prescriptions, ask client if there are any questions and refer to a technician or doctor as needed.
- Be knowledgeable about pet foods and educate clients when food is purchased
- Advise clients on proper nutrition, flea/tick/heartworm preventatives, pre-anesthetic testing, pain management, shampoos, home dental products and other retail items by the Non-Prescription items Guidelines.
- Echo doctors' recommendations when checking out clients
- Address clients as Mr., Mrs. or Miss or by first name.
- Always refer to the veterinarian as doctor. Do not use the doctor's first name in the presence of clients.
- Prepare consent forms, treatment plans and be able to discuss the hospital's financial policies with clients
- Maintain a clean, neat reception area and front desk (limit of 1 item per 1 foot on reception counter)
- Foster collaborative relationships with other team members, departments and sister clinics
- Create a trusting and sympathetic environment on the phone and in person for clients in all scenarios, especially terminal cases

#### **Financial Duties, 10%:**

- Enter accurate charges
- Explain invoices to show value for the care provided, stating all services and products provided before the total
- Collect payment when services are rendered, including making change for cash payments, processing credit cards and getting proper ID for checks and Care Credit.
- Verify the eligibility of clients with charge accounts (where applicable- rescue groups)
- Print or record the end of day financial balances, ensuring they are accurate
- Know fees for routine services
- Balance cash drawer at end of day/shift

#### **Administrative Duties, 7%:**

- Maintain adequate supply of client education materials in the reception area (i.e. brochures, handouts, business cards, etc.)
- Be aware of no-shows, late appointments, and rescheduled appointments and report to the clinic manager as required
- Help clients schedule appointments when referred to a specialist, including directions, records and test results to bring and follow-up status of patient after specialty care
- Prepare forms such as medical records, health and vaccination certificates, lab results and euthanasia certificates
- Review medical records of discharged patients for completeness and accurate charges. Based on your review, refer medical records to a doctor or technician for further review.
- Schedule rechecks and enter callbacks
- Prepare welcome packets for new client folders.
- Ensure all consent forms are signed and an emergency number is noted and a weight is listed on the form and in the computer records
- Delegate admission and discharge of patients for surgery, dentistry, grooming or other procedures to appropriate hospital staff
- Maintain appointment book and grooming reservations
- Retrieve, update and file patient medical records
- Clean up after pets' accidents in the reception area, exam rooms and exterior sidewalks and parking lot
- Call clients whose pets are overdue for services

**Client Education & Marketing Duties, 2%:**

- Promote ancillary services (laser, foods, ultrasound, grooming, online store/scheduling/Pet Desk!)
- Have a thorough knowledge of nutrition and flea/tick/heartworm preventatives
- Sell and promote retail items
- Mail thank-you, sympathy and welcome cards, document on spreadsheets
- Promote practice protocols on wellness and prevention

**Janitorial/ Facilities, 1%:**

- Participate in shared cleaning schedule of bathrooms and breakroom

**Housekeeping Duties:**

- Keep workstation clean and orderly, dusting and wiping down as needed.
- Participate in deep cleaning exam rooms and lobby as needed or assigned
- Monitor lobby throughout the day for cleanliness
- Participate in end of day cleaning: sweeping, vacuuming, mopping, floor scrubbing, emptying trash and recycling

**Educational Requirements & Skills Needed****Educational Requirements:**

- High school diploma or equivalent
- Experience in customer service

**Skills Needed:**

- Ability to work in a fast-paced environment
- Computer literacy, keyboarding skills
- Understand veterinary terminology
- Exceptional customer service skills
- Keep accurate medical records, clerical work
- Educate clients
- Promote hospital products and services
- Support team members by being encouraging and accepting feedback through communication and staff development.
- Emotional stability for helping clients and pets through difficult situations
- Situational awareness
- Self-starter, self-motivated

**Physical Obligations:**

- Able to lift patients and carry equipment up to 25 pounds; ability to lift patients or carry equipment over 25 pounds with assistance
- Endure sitting, standing and walking on hard floor surfaces for extended periods
- Type information for patient records and prescription labels into the computer
- Able to work in noisy work conditions with sounds from animals and equipment
- Able to work with strong odors from animals, equipment and cleaning products
- Take safety precautions for exposure to toxins, drugs, anesthesia and radiation