

Job Title: Client service representative
Reports To: Practice Owner, Practice Manager
Effective Date: February, 2024

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned. All duties are to be performed following established protocols or as directed by the practice owner, practice manager or department supervisor.

Welcome clients and their pets; prepare medical records for appointments; note nature of appointment; obtain and copy previous medical history for new clients and/or patients for our records.

Schedule outpatient and surgical appointments, including verifying client and patient information and contact number, and note the reason for the appointment and any other pertinent information.

Make reminder calls for all appointments and review any pre-procedural feeding instructions. Provide a courtesy call to clients that missed their appointment and offer to reschedule.

Retrieve and prepare records for upcoming appointments. Create and maintain appointment lists for doctors.

Answer incoming calls; determine purpose of calls; forward calls to appropriate personnel or department if needed; take accurate messages and deliver them with relevant information, patient record and contact number to the appropriate personnel.

Receive client requests for prescription diets or medication; if appropriate, review medical records for pertinent information. For prescription medication, complete request form and submit with the medical record to the laboratory staff for approval by a veterinarian.

Maintain current client information in medical records and the computer database; maintain patient records; file patient records accurately. Remove and replace outdated information in the written and computer records. Update records for all pets when owner information has changed.

Enter charges for patients, present invoices to clients, collect and record payments for services rendered. Alert the practice manager if payment arrangements are needed. Complete, verify and sign Promise To Pay Agreements, as directed by practice manager.

Reconcile daily transactions; prepare daily audit trail and deposit reports. Complete bank deposit slips and prepare cash and check deposits. Batch out credit card terminals. In the morning, review and verify deposits from the previous day.

Deliver urine and fecal specimens to the laboratory and record and invoice type of specimen and test requested (if known) in the medical record and computer.

Have basic working knowledge of parasite preventatives and routine vaccine protocols.

Photocopy, fax, scan and email records upon client request, with the approval of the practice owner or practice manager. Enter the appropriate notation in the patient's record. If appropriate, mark the patient inactive. If no further active patients remain for a client, mark the client inactive.

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform these essential functions.

EDUCATION

High school diploma or equivalent (General Education Degree/GED) required.

EXPERIENCE

Six months or more related experience and/or training; or equivalent combination of education and experience. Possession of basic computer skills is essential.

LANGUAGE SKILLS

Effective oral and written communication skills are essential. Use of professional and courteous language during all discourse is mandatory.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to walk and stand. The employee must be able to speak clearly and listen carefully to both clients and other staff members. The employee is required to regularly reach with arms and hands, and to stoop and bend. The employee must regularly lift and/or move up to 10 pounds, frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 30 pounds.

DRESS CODE

The employee is required to be dressed properly. Jewelry and piercings must be small and not dangling. Shoes must be closed-toe, comfortable with low heels and good traction. Sneakers are preferred. Coordinating scrub tops and scrub bottoms are recommended but employee may opt to wear business professional attire (dress slacks, khakis, appropriate tops.) Approval of attire is at the discretion of the practice manager or hospital owner.

Received by:

Printed name Signature and Date