

Job Title: Client Care Specialist
Reports to: Assistant Office Manager and Practice Manager
Requirements: High School Diploma or equivalent

Summary of position:

Client Care Specialists are the first impression of the hospital to clients and patients. They must be friendly, professional, and courteous, and capable of handling many tasks at once with many interruptions without becoming frustrated. The Client Care Specialist (CCS) must be calm even when clients are upset, when it is very busy, or in the face of an emergency. CCS's must be able to professionally handle clients experiencing strong emotions, especially surrounding the process of euthanasia. It is the CCS's responsibility to be sure the front desk is never left unattended. CCS's should greet clients and pets by their name and make them feel welcome. This position requires good computer skills, basic math skills, and the ability to make change. CCS's must have at least a high school diploma or equivalent.

Functions:

- ❖ Opens the office in the morning
 - Turns on reception area computers and opens the appropriate Chrome tabs on each
 - Unlocks front doors
 - Starts answering phones at 7:45am
 - Goes over morning checklist
 - Checks DS Tech Portal (online fax) for lab work or other correspondence, scans into medical record if necessary
 - Checks voicemail and puts messages in appropriate locations
 - Starts a pot of coffee in the client refreshment area
 - Does a visual check that everything looks nice and neat before clients arrive
 - Sort through all after hours payments and rebalance drawer, prints previous day's settlements
- ❖ Answers phones
 - When in the call room, the phone should be answered by the third ring. If both call room client care specialists are busy, a client care specialist sitting in the check in area should answer the phone if they are available to. If all client care specialists are busy at the moment, the voicemail should be checked as soon as possible.
 - Phones should be answered with a friendly greeting like "Good Morning", "and thank you for calling the (Practice Name), this is "Name", how may I help you?"
 - Answers any questions clients have, if appropriate to do so. Receptionists should never give medical advice or consult. If in question, take a message and call the client back after speaking to a doctor or technician.
 - Takes phone messages and/or routes the call to the correct voicemail box.
 - Uses the Communication Tab on ezyVet to communicate questions and pharmacy refills
 - When in call room, checks voicemail box whenever a new message is left and completes call room checklist
- ❖ Scheduling
 - Schedules appointments for clients.
 - Helps ensure we stay on time by alerting the proper technician/doctor team or floater technician if their appointment has been waiting for more than 15 minutes.
- ❖ Checks in clients
 - When in the check-in position, the client care specialist greets the client and patient by name in a welcoming manner and checks the appointment on the Calendar in ezyVet.
 - The client care specialist ensures the client information sheet is up to date (filled out in that calendar year). If it is not up to date, the client care specialists courteously gives the client a new registration form to fill out, and subsequently the client care specialist updates the information in the computer. CCS then scans in the registration form and attaches it to the Contact Tab for that client, and throws away the original form once appropriately saved.
 - Has client fill out any necessary forms (euthanasia consent, procedure check in forms, etc)
 - Weighs patient if time allows to save time for the technicians

- Places a bandana that has been sprayed with Adaptil on dogs or a towel that has been sprayed with Feliway over the carrier of cats and explains why we do this (Fear Free initiatives).
- ❖ **Manages the waiting room**
 - Puts any clients with unruly or loud dogs or loose cats into an empty exam room to keep the waiting room less stressful
 - Puts any grieving or angry clients into an empty exam room. Alerts management to any angry or troublesome clients.
 - Maintains a clean and nice smelling waiting room
- ❖ **Invoices/Checks out clients**
 - When a client comes up front from a room, the client care specialist checks them out
 - When a client comes in for an over the counter product, the client care specialists invoices the product(s) and then checks them out.
 - Collects payment, if necessary, makes change
 - Gives owner any discharge information that is printed with their invoice
 - Notifies the surgery technician when surgery clients are ready to be discharged
 - Runs through any held checks on the appropriate date and sends the client a receipt
 - Schedules rechecks, boosters, surgeries, or any other needed upcoming appointments if the tech didn't in the exam room
 - Requisitions lab work that has been dropped off to run (urinalysis and fecal checks)
- ❖ **Record keeping**
 - Ensures the Contact information is up to date every time a client calls
 - Updates the computer to reflect the death of a patient
 - When making a new account in the software, the client care specialist first confirms that there isn't already one made.
 - Calls other clinics/veterinarians for medical records and vaccine histories
 - Emails or faxes our medical records to other clinics/veterinarian's at the client's request
 - Completes compliance reports as needed by management
- ❖ **Technology**
 - Online Portal and Online Store
 - Is familiar and comfortable with our Online Portal and Online Store
 - Email
 - Checks email and coordinates answers for clients through there
 - Fax
 - Checks and sends faxes through digital portal
 - Zipwhip
 - Texts as needed with clients
 - Google Products
 - Has a good working knowledge of Google Drive, Google Docs, Google Sheets, and Google Forms
- ❖ **Reminders**
 - Calls clients the day before their appointment to confirm what time to come in and if anything special should be brought (i.e. stool samples)
- ❖ **Secretarial duties**
 - Sorts and processes mail
 - Prepares sympathy cards
 - Sends copies of health certificates to the appropriate agencies
 - Stuffs and sends monthly billing to clients
 - Handles miscellaneous correspondence (typing letters for doctors, emailing clients, etc)
 - Prepares and collects pet licenses
- ❖ **Closes out day**
 - Does end of day checklist
 - Runs "end of day" reports
 - Runs a totals report credit card report

- Balances payments received, leaving the appropriate amount in the drawer to make change with the next day
- Puts cash, checks, and credit card reports into the deposit bag and puts in the call room file drawer
- Lock front doors
- Make sure the coffee pot is turned off
- Shut off lights
- Set alarm if the last employee to leave the building
- ❖ Continuing education duties
 - Attends staff and client care specialist meetings unless excused by management
 - Serves as a teacher/mentor to new client care specialist hires
 - Attends continuing education in person or online as required or approved by management

I acknowledge that I have read this job description and agree that I am capable of performing all of the above mentioned job duties. I understand whom I report to and my objectives. I attest to the fact that I possess the attributes listed above which are necessary to fulfill the requirements of my position.

Employee Signature

Date

Practice Manager Signature