

Animal Medical Center



Compassionate Care for Pets

JOB DESCRIPTION: Client Services Team Leader

REPORTS TO: Client Services Supervisor

FUNCTION:

Client Services Representatives have one of the most important and most challenging duties in the entire hospital. Your primary function as a Client Services Representative is to make the clients feel welcome. Because you interact with clients more than any other staff member, the impression you make is a lasting one that can shape a client's entire view of the practice. Your job is demanding and rewarding, and frequently stressful. Whatever the circumstances, it is your duty to project the competence and empathy that is fundamental to our practice philosophy. Never forget that the client is the reason we are here. He or she pays our bills and writes your paycheck. Always keep this in the forefront of your mind.

As a Client Services Team Leader, you shoulder more responsibility than the CSRs. You are a full-time employee of Animal Medical Center and have demonstrated leadership abilities that make your transition to a Team Leader possible. Team Leaders are either chosen directly by the Client Services Supervisor and the Human Resources Manager, or by the preferred method of Client Services Team nomination.

DUTIES and RESPONSIBILITIES

- Enter new clients and new patients into Cornerstone.
- Update client and patient information as needed.
- Schedule appointments for wellness visits and puppy/kitten packages/boosters.
- Schedule appointments for surgery.
- Check-in clients who have/don't have an appointment.
- Welcome the clients and patients by greeting them, offering coffee, showing them to a seat, etc.
- Notify the proper technician, doctor, or staff member of the client & pet's arrival.
- Check-out clients.
- Ability to present charges on the invoice to the client. Assure that owners meet all financial obligations or that acceptable arrangements have been made.
- Process medication refills for technicians.
- Verify refills are correct.
- Call PCS to get/bring a pet to front area.
- Assure all incoming forms are completed and then entered accurately into Cornerstone.
- Schedule boarders.
- Working knowledge of Care Credit, Held checks, and billing on accounts.
- Ability to use TransUnion to verify client credibility.
- Knowledge of vaccine protocol.
- Ability to stock front displays, food, and office supplies.
- Maintain cleanliness and orderliness of front desk and lobby area.
- Knowledge of when to defer to others.
- Knowledge of emergency protocol.

- Knowledge of Euthanasia procedures.
- Knowledge of Animal Release for wild and domestic animals.
- Answer incoming telephone calls utilizing proper telephone etiquette.
- Provide knowledgeable sub-professional advise concerning the care and treatment of animals including questions regarding services, fees, care and treatment in accordance with hospital policies. Appropriately direct other questions and communication to a veterinarian, technician or other staff member.
- Ability to review the past week's charts and assure entries are correct.
- Proper telephone message routing.
- Ability to run End of Shift reports.
- Cash handling abilities. Ability to process cash, checks, debit/credit cards.
- Ability to assure shift report matches drawer count.
- Ability to open the clinic alone and prepare public areas for clients and pets.
- Ability to close the clinic alone.
- Ability to run End of Day procedures accurately.
- Knowledge of flea and heartworm products.
- Knowledge of retail food stock.
- Knowledge of Prescription Food.
- Ability to create patient/client reminders.
- Ability to create a patient estimate.
- Knowledge of Rabies Observation policies.
- Knowledge of health certificate procedures.
- Knowledge of rabies certificate forms (both computer and non-computer generated).
- Ability to process deceased pets' charts, including mailing sympathy cards.
- Knowledge of basic codes and abbreviations.
- Ability to process payments for held checks, returned checks, and payment on account.
- Assure credit card machine tape and prescription labels are in stock.
- Assures weekly patient census is maintained.
- Assures FYI adoption board is maintained.
- Assures food is stocked in a timely manner after delivery.
- Prepare miscellaneous correspondence as needed.
- Assures the daily backup is completed – notifies HA when there is an error.
- Assures requests from online pharmacies are responded to.
- Assures the Suite checklist and supplies for suites are maintained.
- Assures Care Credit stock/forms are maintained.
- Assures educational pamphlets are stocked.
- Assures updates to the Employee Telephone List monthly.
- Boarding letters, new client welcome letters, referral letters are prepared and mailed.
- Vendor coupons and redemption information maintained to assure AMC is reimbursed.
- Client files and archives are maintained
- Seasonal events for the lobby client/consumer board.
- Inventory and ordering of all retail stock, excluding food (except Eukanuba). This includes shampoos, candles and sprays, leashes and collars, toys, plastic shopping bags, and Summit products.
- Inventory of office supplies including tab bands.
- Assures tab bands and cage cards are stamped.
- PVLs are transferred weekly and at EOM.
- Ability to review discharge summaries with clients when a technician is not available.
- Assures health certificates and rabies certificate files, including sending copies to appropriate government agencies are maintained.
- Must have demonstrated experience and expertise in the following skills:
 - • Phone etiquette
 - • Appointment scheduling
 - • Client relations
 - • Money handling
 - • Conflict resolution
 - • Collection of payments

- Generate referral letters and new client letters.
- Generate and mail boarding letters.
- Dr. Nicholls' COP calls.
- Other partner COP calls.
- Associate Dr. COP calls.
- Vaccine and booster reminder calls.
- Other duties as assigned.

POSITION REQUIREMENTS

EDUCATION

- High School diploma preferred.
- Must complete CS training video program upon hire.

EXPERIENCE

- Must possess 1 year of experience in Customer Service, preferably in animal/human healthcare.
- Must have held Client Services Representative II position for at least 6 months or at the discretion of the HRM.
- Attend 1 CE pertaining to Client Services annually.

PERSONAL

- Must be able to work under the broad general administrative supervision of the Hospital Administrator and Human Resources Manager.
- Must maintain proper appearance and personal conduct at the front desk.
- Must adhere to the policies and procedures as outlined in the Employee Manual.
- Must be able to communicate with staff and clients using considerable tact and diplomacy.
- Ability to work well with other staff members and supervisor.
- Possess strong communication skills, able to communicate clearly to doctors, staff, and clients.
- Ability to multi-task, i.e. answer the phone and prepare a client to checkout.
- Strong knowledge of all over-the-counter products that are sold such as flea and tick preventative, shampoos, and pet foods.
- Possess strong computer skills.
- Ability to be flexible and adapt professionally to change.
- Possess a good understanding of hospital policies and procedures.
- Possess strong organizational skills.
- Ability to keep a clean working environment.
- Be motivated and self-starting with a positive attitude.
- Want to come to work and want to be here when you get here.
- Inspire others and manage others by leading.
- Play an active role in the Client Services Meetings.
- Accept the mission statement of AMC.