

1.2. Client Service Representative (CSR)

Purpose of the Position			
<p>The Client Service Representative (CSR) performs a vital role in our practice recognizing and meeting all client needs. The CSR is a powerful factor in determining if a customer has a positive experience. The CSR will be helping the client with every step of the process during their visit to the hospital (check in, triage, updates, presenting Treatment Plans, financial transactions, discharge process, etc.). They must have a compassionate, caring, understanding attitude toward worried and distraught clients and a sincerely helpful attitude with angry or frustrated clients.</p>			
Reports to	Knowledge and Experience	Personal Attributes	Skills
CSR Supervisor / Shift Leader	<ul style="list-style-type: none"> o computer skills o client service experience o one year of veterinary experience 	<ul style="list-style-type: none"> o pleasant phone voice o outgoing, sensitive and friendly o possess sensitivity and empathy o service and client-oriented o organized o upbeat personality o honest and trustworthy o respectful o flexible o professional o organized o cheerful 	<ul style="list-style-type: none"> o excellent interpersonal skills o able to create relationships with people even in stressful situations o able to enter information in the computer o able to remain calm in stressful situations o effective verbal, listening and communication skills o strong multi-tasking skills o analytical and problem solving skills

Responsibilities: Job responsibilities include, but are not limited to, the following. Essential job functions for this position are in bold:

o Client Responsibilities:

1. Immediately acknowledge and greet any patients, clients or staff members upon arrival with a smile.
2. Effectively triage patients arriving to the hospital. Recognize a critical patient that needs to be brought to the treatment area for immediate medical attention.

3. Obtain the presenting complaint, duration of problem, TPR and weight of emergency patients arriving to the hospital.
4. Immediately notify a Doctor if a patient appears to need immediate medical attention.
5. Lead the emergency client to a room as needed.
6. Bring emergency patients to the treatment area and notify to the Lead Technician or Doctor.
7. Input information into the computer.
8. Be able to account for all clients (emergency and specialties) in the lobby, discharge area, and exam rooms at all times.
9. Immediately notify the Shift Leader / CSR Supervisor / Doctor of any client that seems to be uncomfortable or unhappy with any aspect of our hospital.
10. Ensure the proper and timely flow of patients (emergency and specialties) presenting to the treatment area, waiting for outpatient treatments and discharge of patients. Pay particular attention to the patients that present immediately to the treatment area and patients that are ready to be discharged.
11. Process CareCredit Applications, Scratchpay, and installment agreements
12. Be able to accurately check in patients in Ezyvet and send to Smartflow.
13. Personally check all patients for cleanliness before discharge. Groom as needed.
14. Fax, organize and file medical records continuously throughout your shift.
15. Be able to put together charts for hospitalized patients.
16. Be able to compassionately and privately present a "critical care estimate" and collect fees.
17. Be able to perform a discharge efficiently, including discussion of discharge instructions and ensuring clients receive all appropriate items.
18. Fill and dispense prescriptions as directed by the Doctor. Ensure that all medications/prescriptions are double checked by another staff member before giving them to client.
19. Be able to input fees into Ezyvet from a Smarflow
20. Be able to present treatment plans according to HOSPITAL protocol, ensure that the client understood the detail of the treatment plans.
21. Be able to process all financial transactions and complete accounting procedures accurately in computer.
22. Collect appropriate fees, and process paperwork accurately.
23. Efficiently and compassionately complete euthanasia paperwork and client check out.
24. Notify the client if a new CSR needs to take over their case.

o Phone Responsibilities:

25. Answer every phone call before the third ring with a friendly and compassionate tone.
26. Provide basic medical advice. If you are unsure, ask a CSR Supervisor, Technician or Doctor for the correct advice.
26. Be able to address client questions and provide accurate information, both on the phone and in person.
27. Never make diagnoses or refuse service.
28. Immediately notify a HOSPITAL doctor if a referring veterinarian is on the phone.
29. Direct telephone calls to the appropriate party, and creating callbacks in Ezyvet
30. Take personal responsibility for any commitment made to clients and RDVMs during phone conversations.
31. Update the medical records regarding any patients not in the hospital.

o Facilities(At the beginning of your shift /Iftherearen o clients in the Hospital)

34. Assist in monitoring reception and exam rooms discharge areas and lobby for cleanliness.
35. Clean and stock all exam rooms before leaving at the end of your shift.
36. Perform general janitorial duties to help maintain a clean professional hospital.

o BackupResponsibilities(IfaReceptionistisnotavailable)

37. Ask the client the reason for their visit. Know the presenting complaint of all patients.
38. Assist in properly identifying each patient with a cage card on every occupied cage.
39. Continuous and accurate updating of the whiteboard in the treatment area.
40. Offer blankets or rugs to waiting pets in the lobby.
41. Frequently contact waiting clients in the lobby and rooms to offer refreshments and snacks.
42. Be aware of television programming and identify if it is appropriate for the clients. Give the client a list of channels and adjust upon request.
43. Ensure that the customer beverage area is cleaned and stocked at all times.
44. Keep all clients (emergency) updated after the first 15 minutes and then every 30 minutes on the progress of their visit and their pet's care.
45. Monitor the clients (specialties) waiting time. If the client is waiting more than 15 min without been seeing by the Dr. or 30 min without new information notify the Technician.
46. Ensure that every client receives a comment card at discharge (emergency and specialties).
47. Help waiting clients with their pets as needed including: holding their pets while they are being discharged, walking clients/pets to their cars, cleaning soiled carriers, etc.

General

48. Foster HOSPITAL Code of Conduct.
49. Assist in training other staff members under the direction of the Lead and Service Manager.
50. Be able to work with other team members and consistently treat all clients and co-workers with courtesy and professionalism.
51. Always respect patient/client confidentiality.
52. Maintain a well-groomed appearance and adhere to HOSPITAL uniform policy. Always wear your name tag.
53. Complete training and continuing education assignments on schedule.
54. Attend all mandatory staff meetings.
55. Check and be responsible for information provided in HOSPITAL e-mails, bulletins, mailbox and communication boards.
56. Refrain from personal conversations with other staff members while clients are present in exam rooms or the lobby.
57. Follow safe procedures and immediately inform your Supervisor of unsafe conditions/practices.
58. Handle all animals with both caution and compassion. Do not physically discipline animals.
59. Be capable of safely lifting a medium-sized dog (40 lbs.) by yourself.
60. Handle dogs and cats without allergic reaction.
61. Required shifts will be scheduled on nights, weekends, and holidays. You will be working beyond regularly scheduled shifts at times due to an unexpectedly heavy emergency caseload.
62. Support other services when required.

Perform the responsibilities listed in following Job Description. Please refer to, read and sign:

The above is only a partial list of job responsibilities. In addition, you may be asked to perform other tasks.

I have read and understand the responsibilities required of a CSR at the HOSPITAL. I am physically and mentally capable of performing each of the tasks above and understand that these are the reasonable expectations of this position. I understand that employment with the hospital is not for a specified term and can be terminated "at-will", with or without cause, and with or without notice, at any time, either at the option of the employee or the employer.

_____ Signature
Print Name Date
