

RECEPTIONIST JOB DESCRIPTION

Receptionists (also called customer service representatives) are the customer-relations experts in a veterinary practice. They are the clients' first impression of the practice, on the phone or in person. Receptionists must possess strong organizational skills, excellent telephone and interpersonal communication skills, and the ability to remain calm under pressure. Receptionists must have compassion for animals and their owners and understand the stress that patients and clients endure.

Receptionists are responsible for greeting clients; differentiating routine cases from emergency cases; scheduling appointments; entering client, patient, and financial data into the computer; generating invoices and explaining them to clients; processing payments; and managing the retrieval and storage of medical records.

Receptionists should expect to spend nearly all of their workdays at the front desk. The position requires the completion of a high-school degree or further education, competence in the English language, patience, and a pleasant manner. Ideally, newly hired receptionists will possess computer skills and have had cashier and related front-office work experience.

General Knowledge and Tasks

General Knowledge

- Keep a street map readily retrievable, and give directions to the practice.
- Know the range of services the practice provides and the species it treats.
- Be reasonably familiar with breeds and coat colors.
- Follow OSHA standards. Be able to find Safety Data Sheets quickly.
- Know standard medical and business abbreviations.
- Use proper medical terminology when speaking and writing.
- Competently speak and write the English language.
- Understand the life cycle and pathology of common parasites (intestinal parasites, heartworms, fleas, ticks), and know the names of most common preventatives, recommended treatments, and diagnostics.
- Be familiar with zoonotic (contagious) diseases, including their prevention and steps to reduce or eliminate transmission.
- Communicate with clients about the various pet-identification systems available, including tags, tattoos, and microchips.
- Know the policies regarding provision of veterinary care, treatment of stray animals, deposits for hospitalized patients, payments, credit, pet health insurance, and finance fees.

General Tasks

- Always be in position and prepared to work by the start of each scheduled shift.
- Ensure accurate personal time records are made via the practice management software system.
- Be aware of cleanliness of clinic and grounds. Routinely pick up trash or feces from the parking lot, sidewalks, or entryways.

- Routinely police front entrances of practice so that you see what clients see. Correct any discrepancies immediately.
- Maintain a professional appearance while at work, including clean and pressed uniforms or clothes. Change clothes daily as necessary to look professional and avoid carrying odors.
- Smile and maintain an even, friendly demeanor while on the job.
- Perform job tasks efficiently without rushing.
- Handle stress and pressure with poise and tact.
- Be willing and available to stay late or through breaks, when needed, to assist with emergency or critical-care patients and their owners.
- Show respect for clients, team members, and animals (alive or deceased) at all times.
- Have the physical strength and ability to stand for an entire shift when needed, and be able to lift pets and objects weighing up to 50 pounds without assistance. Assist in lifting patients weighing more than 50 pounds.
- Prioritize tasks to maximize client satisfaction and patient health.
- Maintain a list of tasks and engage in productive work during slow periods.
- Assist other employees as needed. Take over for colleagues when they are called away to another priority.
- Participate in your performance appraisal, and, as requested, in those of others.
- Participate in all staff and training meetings.
- Conduct tours of the practice and/or kennel. Before each tour, ensure that the facility is orderly and that staff and patients are prepared for tours.
- Maintain constant vigilance regarding open doorways that could allow pets to escape from the facility.
- Maintain strict confidentiality regarding clients and patients for whom the practice provides veterinary services.
- Be prepared to handle any facility emergency that may arise, including facility fire or weather-related emergencies. Follow contingency plans.
- Always employ proper use of personal protective gear when handling medical or biological waste.
- Participate in daily housekeeping or facility maintenance activities as directed.
- Follow established closing procedures to ensure the security of patients, staff, data, revenue, inventory, and the facility.

Client-Interaction Tasks

Face-to-Face Client-Interaction Tasks

- Cordially greet arriving clients and patients, and address each by name.
- While handling phone calls, acknowledge the arrival of people in the reception area with eye contact and/or a hand wave.
- Review consent forms with clients and have clients sign the forms. Check that the clients' signatures match the signatures on the records.
- Advise clients of special call-in times to check on patients or speak with doctors.
- Using reminder, recall-system, and outpatient-visit and patient-admission protocols, advise clients of recommended services for their pets.

- Explain special programs offered by the practice.
- Advise clients of significant changes in policies or services since their last visit.
- Be able to discuss with clients general information regarding internal and external parasite control, diets, over-the-counter products, and behavior management tools.
- Refer product questions you are unable to fully or accurately answer to doctors or technicians.
- Give estimates for services to be performed on patients.
- Provide clients with handouts and brochures regarding relevant medical conditions, surgeries, immunizations, internal and external parasites, pet insurance, and diets.
- Explain delays to clients. Ensure the comfort of clients and patients during their waits. Reschedule appointments as needed.
- Placate and/or compensate clients distressed by long waits, scheduling glitches, and other problems.
- Escort clients and patients to clean, empty exam rooms free of persistent, offensive odors.
- Assist clients with unruly or unrestrained pets. Ensure that all dogs are leashed and that cats and smaller pets are caged. Isolate aggressive pets. Request assistance as needed.
- Monitor patients' behaviors and note potentially aggressive behaviors. Use caution when handling aggressive or potentially aggressive pets. Request assistance when needed.
- Offer refreshments to clients or water to patients in need (when medically appropriate).
- Handle angry or grieving clients in a calm, reassuring manner. Escort complaining or angry clients from the reception area to a separate, closed room where their complaints may be heard privately. When necessary, enlist a doctor or the hospital administrator to resolve the complaint.
- Dispense prescribed medications and diets to clients after verifying accuracy of label. Discuss dosing and administration instructions to ensure that clients understand the use of prescribed products. Advise clients of common side effects of dispensed medications as instructed by doctors or technicians.
- Discharge hospitalized patients and boarded and groomed pets. Review discharge instructions and medications with clients. Give a copy of the instructions to the client and put a copy in the medical record. Discuss any problems noted in the record. For hospitalized patients, schedule recheck (medical progress) appointments and follow-up callbacks.
- Provide basic grief counseling and arrange for more in-depth counseling for clients in need. Always be sensitive to background chatter or conversations that could exacerbate the anxieties and grief clients experience during euthanasias or deaths of their pets.
- Provide clients with information regarding options available for the remains of deceased pets.
- Assist clients transport their pets to and from vehicles if needed.
- Distribute puppy, kitten, and new patient kits.

Client-Interaction Telephone Tasks

- Use clients' and patients' names during conversations.
- Schedule appointments for exams, rechecks, surgeries, medical procedures, boarding, and grooming.
- Call, text, or message clients with hospitalized pets to provide patient status updates.

- Provide basic pricing information to callers, emphasizing quality and value of services provided. Respond in a manner that encourages potential clients to visit the practice.
- Answer routine questions or refer callers to the appropriate colleagues.
- Receive and record prescription-refill requests.
- Schedule euthanasias to maximize the comfort of clients and patients while allowing the practice to run efficiently.
- Schedule house calls according to written guidelines.
- Call clients scheduled for the next day to remind them of their appointments, appointment times, and special instructions, such as the need for fasting or withholding or administering medications.
- Call clients on the callback lists to check on patients' well-being and answer questions.
- Call clients who missed appointments and reschedule their appointments.

Doctor/Technician-Support Tasks

- Seek the assistance of doctors or technicians immediately when assessing potentially critical patients.
- Verify and obtain approval from a veterinarian prior to dispensing or delivering medication to a client.
- Ensure that doctors, technicians, and assistants enter occupied exam rooms within reasonable time periods.
- Possess sufficient strength and assertiveness to effectively restrain patients and ensure the safety of clients and personnel.
- When requested to assist, restrain pets in a manner that allows necessary work to be performed, minimizes patient stress, and ensures their safety and that of other people.
- Obtain current patient-status reports or updates from doctors, technicians, or assistants.
- Prepare medications and prescriptions for dispensing as directed by the doctor. Ensure that each prescription label contains the following information: doctor's name; practice's name, address, and phone number including area code; date; patient's and client's name; medication name, strength and volume (or number); administration instructions including route of administration, such as by mouth or in the ear; and product's expiration date.
- Inform the hospital administrator or doctors immediately of all bite or scratch wounds you suffer so that reports can be made and you can be referred for timely medical care by a physician, if necessary. Clean all wounds quickly and thoroughly.

General Telephone Tasks

- Know phone functions, including hold, intercom, transfer, forward, and three-way calling.
- Answer the phone by the third ring and use the recommended greeting.
- Smile while answering and talking on the phone to enhance the friendly quality of your voice.
- Manage multiple phone lines effectively; prioritize phone calls.
- Follow the written telephone scripts.
- Transfer calls to the answering service or set the answering machine to accept calls during staff meetings and hours during which the practice is closed. Stop transfer of calls to the

answering service or turn off the answering machine when staff members are available to receive calls.

- Call in prescriptions to outside pharmacies.
- Transcribe messages from the answering machine and distribute messages appropriately.
- Accurately record messages for doctors and staff. Note the caller's name, date, time of call, return phone number, and message. Notify recipients of urgent messages immediately. Place routine messages in the appropriate communication boxes.

Medical-Record Management Tasks

Daily Medical-Record Preparation Tasks

- Create travel sheets and prepare client/patient info sheets for incoming appointments.
- Make reminder calls to clients with scheduled next-day appointments.
- Prior to the client's arrival, prepare the patient's travel sheet with the date and a brief synopsis of the reasons for the visit. Upon client's arrival confirm information and ensure completeness.
- Check for and enter phone, address, and email updates in clients' records.
- Check for and enter medical updates (spay/neuter status, immunization status, microchip number) in patients' medical records.
- For patients that are being admitted, attach cage cards and completed client-consent or other forms to the medical record.

Medical-Record Filing Tasks

- Understand the medical-record filing system.
- Know all possible locations for storage of records of hospitalized patients.
- Properly use bins or slots assigned to doctors, staff, pharmacy, lab, and callbacks.
- Accurately file all paper medical records.
- Check for misfiled records and file them properly.
- Understand the definition of an "inactive" client or patient record. Store these records numerically or alphabetically as directed.
- Retain a list of inactive clients, and know where inactive files are stored.

General Medical-Record Tasks

- Ensure that medical charts or records to be filed are complete and that they include current laboratory test results, doctors' notes, and forms. Ensure that records have been updated to reflect financial transactions, medications and products dispensed, weights, immunizations, and diagnoses.
- Understand and properly use special record notations, including male, female, aggressive, caution, no credit/charging, and inactive.
- Transfer patient records upon written request of clients and approval of attending doctors or the practice owner.

Reception-Area and Front-Office Tasks

Front-Office Management Tasks

- Schedule receptionists in a manner that meets the practice's and staff's needs.
- Assist in the hiring of new receptionists by advising candidates of openings, offering them applications, working with them to help evaluate their personalities and skill levels, and providing your opinion to the hiring manager.
- Train new receptionists in the basic skills of the position and the practice's philosophy.
- Train receptionists in the areas where they need to expand their skills and knowledge.
- Repair malfunctioning equipment or bring the malfunction to the manager's attention.

Reception-Area Housekeeping Tasks

- Keep the reception area clean and organized by dusting, picking up trash, and organizing the work area.
- Vacuum or sweep the reception area and waiting room as needed to keep these areas clean and free of hair.
- Place mats on the floor and towels by the door on rainy or snowy days to prevent clients and patients from slipping and to minimize the tracking in of water and mud.
- Offer towels to pet owners to dry their pets during inclement weather.
- Clean urinary and fecal accidents in the waiting room immediately; check with doctors or technicians to see if they need samples for diagnostics before discarding them.
- Maintain a current and attractive selection of reading material in the reception area.
- Check exam rooms between clients and straighten them as needed by sweeping, cleaning the exam table and instruments, and restocking rooms. Dispose of used needles and syringes as set forth by the practice's policy and OSHA standards.
- Check public restroom(s) and clean them as needed. Restock toilet paper, paper towels, and hand soap as needed.
- Keep the entrance, stairs, and sidewalks clean, safe, and presentable.
- Keep coffee and beverages stocked and available for clients.
- Turn on the radio or sound system at the beginning of the day, and turn it off at the end of the day.
- Keep the temperature at a comfortable level. As established by the practice manager, adjust the heat or air-conditioning as needed. Ensure that windows are closed when the air-conditioning is on.
- Water, feed, and maintain plants/fish so that they are vibrant and add to the professional appearance of the practice.
- Participate in daily housekeeping or facility maintenance activities as directed.

Supplies-Management Tasks

- Restock office supplies and products in the retail and pharmacy areas.
- Establish and/or maintain a list of depleted office supplies, handouts, and medical-record supplies. Order replacement supplies or request that the office manager do so.

- Keep forms, brochures, and handouts neatly stocked and readily available to share with clients.
- Assist with drug, food, and supply inventory management by following inventory-management protocols and notifying manager(s) of low stock.
- Receive deliveries; check contents of deliveries against invoices and immediately note package shortages or damaged shipments.

Other Reception-Area Tasks

- Maintain the welcome/bulletin board or showcase information in an orderly and attractive format.
- Maintain contact with animal-control officers, animal inspectors, and town officials regarding lost or stray animals and animals subject to rabies quarantines.
- Maintain a file of lost and found pets.
- Maintain a phone and address list of local resources for training, boarding, and grooming, as well as for animal-control officers, animal inspectors, city officials, township officials, state officials, veterinary medical association contacts, and other professional contacts.
- Set up referral appointments and complete all necessary paperwork.
- Label and mail monthly service reminders in a timely fashion.
- Be prepared to handle medical emergencies at all times. Recognize the symptoms of pets and clients in crisis. Alert doctors and technicians to emergency situations. Prepare rooms for incoming emergencies.
- Follow scheduling guidelines to maximize efficiency when booking clients. Properly utilize emergency or open slots in the schedule.
- Reorganize daily appointment schedules as needed to account for emergency situations and time overruns.
- Follow isolation procedures when greeting clients with contagious or potentially contagious patients. Using the designated products and dilutions for disinfectants, properly disinfect your shoes, hands, and clothing before leaving isolation areas.
- Assign and dispense rabies tags.
- Send correspondence, including thank-you notes, condolence cards, and welcome cards.

Computer Tasks

General Computer Tasks

- Use your own password identification to enter the practice-management software and signify your work.
- Properly use the doctor's identification to attribute work performed by various doctors to accurately reflect their production records.
- Print appointment, drop-off, and surgery schedules for each day.
- Print a list of expected boarders and grooming clients for each day.
- Schedule examinations, drop-offs, surgery, grooming appointments, and boarding reservations.
- Use practice-management software procedures to check in clients.

- Back up computer files at the close of each business day or as directed.
- Know the clip-art and desktop-publishing software sufficiently to develop or aid in the development of forms, notices, and newsletters.

Database-Management Tasks

- Add new clients and new patients into the computer system as appropriate.
- Inactivate clients or patients using correct software procedures.
- Insert notes regarding important communications with clients in computerized or hard-copy medical records.
- Enter notes, diagnoses, and/or travel-sheet diagnostic codes from doctors regarding examination findings, treatments, diagnostics, procedures, and diagnoses.
- Inquire about and record vital changes in client or patient information, including weight, immunization status, microchip number, and spay/neuter status. Update the medical record in the computer.
- Input reminders and callbacks.

Word-Processing Tasks

- Know the word-processing program sufficiently to draft letters and modify and print forms or letters.
- Print hard copies of forms for incoming clients whose pets will have anesthetic, surgical, dental, or medical procedures.
- Generate records of rabies immunizations for clients and town, city, and county officials.
- Produce immunization, health, and neuter certificates.

Report-Generation Tasks

- Print monthly service reminders.
- Create daily callback list(s) and transfer them to person(s) responsible for calls.
- Generate end-of-day reports.
- Generate end-of-month reports and end-of-year reports.
- Adjust computerized products and supplies inventory to reflect items used and/or disposed of.
- Search for, save, and print special lists from the database, such as patients that are overdue for services, new patients, and/or new clients per month.

Internet-Based Tasks

- Know how to access and navigate the Internet to download email, find veterinary websites, order supplies, and access information for clients.
- Be familiar with the practice's website.
- Prepare and send email reminders and notices.
- Respond to basic questions sent via email.
- Handle online appointment bookings.

Financial Tasks

Cash-Management Tasks

- Ensure that the cash register has sufficient change for each day's monetary transactions. Change money at the bank as necessary.
- Count and record the cash in the drawer each morning and at shift changes.
- Count and record the cash in the drawer at closing. Reduce the drawer to the starting amount of cash.

Daily Closing Financial Tasks

- Prepare daily bank deposits.
- Be prepared to deliver deposits to the bank on a daily basis, as directed by the owners.
- Balance the daily and monthly revenue records against check deposits and credit and cash receipts; check math for accuracy.
- Match each day's monetary intake (cash, checks, and credit cards slips) with the computerized day summary sheet or handwritten invoices.

Payment-Processing Tasks

- Correctly apply discounts for employees, shelters, multiple pets, coupons, and complimentary exams.
- Properly enter charges from travel or circle sheets or patient records into the computer.
- Process clients' cash, credit card, debit card, and check payments.
- Accurately record all payments in client/patient records and in the bookkeeping system.
- Give accurate change.
- Ensure that checks have proper identifying information recorded on them (identity or driver's license number), that checks are dated and signed, and that clients have provided and you have reviewed proper corroborating identification.
- Process checks properly for electronic check acceptance.
- Check that clients' signatures on credit receipts match those on credit cards or their photo identification.
- Provide clients with printed receipts of their transactions, whether or not they have requested them.
- Produce legible and accurate receipts.
- Review itemized entries on receipts with clients at the time of payment.
- Answer clients' questions regarding charges, or refer questions to the appropriate colleague.

Tasks Related to Incomplete Payments

- Process and help clients complete CareCredit® applications. Complete CareCredit training syllabus.

- Complete or file pet health insurance claims on behalf of clients as directed by the practice manager or doctors.
- Process clients' credit applications and store them in clients' records.
- Properly record and file deferred payments.
- Record returned checks and adjust clients' accounts to reflect returned-check fees.
- Issue updated invoices to clients, including appropriate finance charges, and show accurate balances due on their accounts.
- Search for and refer delinquent accounts to a collection service as directed by the hospital administrator.