

**JOB DESCRIPTION for Customer Service Representative (CSR)**

**MVC Mission:**

To provide individualized, thoughtful and practical care for pets and the people who love them.  
For all else, it depends.

**MVC Core Values:**

1. **Be deserving of trust** - Our co-workers, clients and patients expect us to have their best interests in mind with everything we do. It takes hard, team-oriented, selfless work every day to continue to earn that priceless commodity.
2. **Be a good person** - Our integrity, empathy, loyalty, desire for clear communication and thoughtfulness will demonstrate that we truly care about those around us.
3. **Think** - Nothing is completely routine in veterinary medicine or client service. We keep our brains turned on and tuned in so that we can be creative and resourceful while we remain focused and aware.
4. **Own it** - We take pride in our work. We have a responsibility to do our best because we are accountable for our performance.
5. **Learn and grow** - By being intellectually curious, open-minded and learning from our mistakes, we continue to improve ourselves and MVC and meet the ever-changing needs of our patients, clients and team.

**Overview**

The Customer Service Representative, or CSR, is the first point of contact for anyone visiting, calling, emailing or texting our hospital and as such the CSR always recognizes that she or he will create the critically important first impression of MVC for that interaction. In addition to that key role, CSRs are the “traffic managers” of the hospital, controlling and directing the flow of clients and client interactions throughout the clinic. It almost goes without saying that the CSR’s ability to deftly handle activity peaks, schedule changes and difficult situations directly impacts their success in this function. CSRs also manage client transactions, product needs, incoming/outgoing client/patient information and they take part in documenting all of it. The CSR has the added challenge of performing their duties in a “fish tank” since much of their work is performed in the presence of the clients they are serving.

Above and beyond any category of duties or particular task listed in this document, all employees at Manchester Veterinary Clinic must have the ability to work within the guiding principles of MVC’s Mission Statement and Core Values. Typically, these are innate behaviors and patterns of interaction rather than learned skills. Team members are selected because they have demonstrated these abilities or the potential to display them. Team members either have it or they are not part of our team.

**Responsibilities****Traffic Flow Management**

- Greet and welcome each visitor and either know or assess why they are here
- Act on that information: check-in appointments, send home medications / products / pets, manage walk-ins & emergencies, manage vendors, service providers and visitors
- Review and explain invoices with clients, post invoices and check clients out of clinic
- Crowd management: whether lined up coming in, lined up going out or just waiting, create correct expectations and a positive experience; assist owners with pet management, especially during busy scenarios, to help minimize both client stress and potentially unsafe situations

**Telephone Management**

- Answer incoming calls and assess needs while balancing etiquette with efficiency
- Deal with caller's needs and/or connect to appropriate party / voicemail box and create appropriate expectation
- Retrieve and deal with voice mail messages
- Call clients to answer questions, get updates, confirm appointments, resolve concerns
- Turn phone shoppers into clients; turn away sales calls when necessary
- Manage phone and voicemail system for special situations like meetings and holidays

**Record Keeping, Information Management – Practice Management Software and Computer Network**

- Create and update client and patient records
- Create and update medical notes
- Locate and retrieve client, patient and medical information
- Locate information on clinic drugs and products including price and inventory status
- Prepare and transmit (involving printing, mailing, scanning, and emailing) computer-generated forms such as check-in documents, invoices, estimates, certificates, lab requests and medical histories
- Locate office forms, client education materials and other resources from network folders

**Digital Client Interface Management**

- Receive, send and respond to emails, texts, faxes and other online requests for products, prescriptions, services or answers to questions
- Upload and download medical histories, forms and documents

**Schedule and Manage Appointments**

- Schedule appointments to meet client expectations, patient medical requirements and clinic needs
- Manage real and perceived emergency situations to maximize client service and minimize schedule disruption
- Review, confirm and modify existing appointments, and document accordingly

**Manage Payments and Bookkeeping**

- Handle cash, check, credit card and debit card transactions and appropriately document the,
- Perform end of day balancing and reconciliation

**Client education**

- Supply clients with information about our standard recommendations on animal husbandry, wellness care and disease / parasite prevention
- Direct requests for more detailed information to appropriate sources (brochures, clinic-prepared handouts, websites, etc.) or staff
- Echo the more detailed information clients have obtained from other staff members so that the clinic provides a unified stream of information
- Supply clients with basic information / instruction on medications and products, reinforce doctor/tech-supplied direction and encouraging compliance

**Waiting Room and Client Reception Area Maintenance and Preparation**

- Vacuuming, mopping, dusting, bathroom cleaning
- Removal of animal waste
- Restocking and moving products, including boxes and food bags, from basement to reception area

**Miscellaneous**

- Take on and perform special projects
- Take on and manage one or more specific areas of responsibility
- Assist in the training of new staff
- Perform other duties, possibly outside the scope of CSR work, as assigned

**Competencies**

This is the basic skill set that allows the CSR to perform the job with maximal success and productivity. These are not job prerequisites but timely mastery of all of these skills through training, experience and continuing education is an expectation.

- Working knowledge and effective understanding of Cornerstone (MVC's practice management software), and computer network and basic familiarity with hardware such as printers and photocopier (including scan and fax features)
- Working knowledge of MVC telephone and voicemail systems and equipment
- Working knowledge of MVC client digital interfaces such as email, VetTools, Purina VetDirect, VetSource and interactive features of MVC website
- Working knowledge of MVC digital messaging system, presently Slack
- Working knowledge of MVC's Employee Handbook
- Working knowledge of MVC's employee online scheduling software, presently When to Work
- Working knowledge and understanding of appropriate use of MVC's time clock program
- Working knowledge of MVC vocabulary and abbreviations
- Working knowledge of MVC's "pink card" inventory system
- Documented understanding of MVC's Hazard Communication Plan and all of its content
- Care Credit training and certification
- Mastery of appointment scheduling techniques and strategies; this requires skills and knowledge in many areas including communication, client history, pet health needs and illnesses, practice management software, staffing and MVC policies and philosophy
- Familiarity with and ongoing knowledge of operations throughout the rest of the clinic, particularly the ACN and the ERA roles who are frequently called upon to help CSR's
- Mastery of basic communication skills and strategies to maximize effectiveness of interactions with clients and co-workers
- Mastery of customer service strategies, such as telephone techniques and that create raving fans
- Familiarity with MVC's proven processes and standard operating procedures including how to access them
- Familiarity with MVC client education resources including MVC website
- Familiarity with general veterinary information and vocabulary, and specific knowledge of MVC recommendations for disease prevention, disease screening, nutrition and wellness care

**CE and Areas of Expected Growth:**

Ongoing training in CSR skills and veterinary knowledge with demonstration of advancing achievement is expected. CE expectations include:

- Completion of CSR training Level 1 and 2 from Ignitevet.com within the first 6 months of employment
- Attendance at and participation in regularly scheduled staff meetings and midday rounds
- Regular use of CE time and money allowances as described in Employee Handbook
- Completion of any other assigned CE work

**Position Requirements / Physical Requirements**

- Minimum age requirement is 18 years
- Minimum education requirement is a high school diploma; college level education / degree is preferred
- Minimum work experience of 1 year in customer service work; reception work in a medical or veterinary office preferred but is not required
- Animal care and/or husbandry experience preferred
- Basic computer skills; typing and working knowledge of MS Office, Google Drive (and related programs) and PDF programs, ability to learn new software rapidly, ability to navigate computer network and the Internet
- Availability to work a variety of day, evening, weekend and holiday shifts to include short and long (10hr) shifts, typically not in a fixed week-to-week pattern
- Availability to prioritize, with advanced information, attendance at staff meetings and clinic events even on days off
- Ability to maintain a professional appearance and demeanor along with a positive attitude; a sense of humor is a plus
- Ability to communicate clearly both verbally and in writing
- Ability to lift and carry objects weighing 40 pounds without assistance and objects weighing more than that with assistance
- Ability to work standing, sitting, bending and kneeling/on the ground for sustained periods of time
- Ability to accept constructive feedback and use it for improved job performance
- Within the realm of a safe work environment, the ability to accept, without disdain or impeded productivity: exposure to unpleasant noises and odors; the sight of blood; exposure to animal waste, stress, illness, pain, death and euthanasia; exposure to the full range of human emotions that may be expressed by pet owners; exposure to the risk of animal bites, scratches and zoonotic diseases

By signing below, I agree that I will be able to meet the requirements and perform the duties listed above. I also understand that any request for relief from the physical requirements of this position must be accompanied by physician documentation, and may affect my employment with this company should I not be able to perform these duties for any significant period of time.

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Employee Signature

Printed Name

Date

Employee: Please retain a copy of this document.

Manager: Please put in HR file.