

JOB DESCRIPTION

RECEPTIONIST TEAM LEADER



INTRODUCTION

The Receptionist Team Leader trains, supervises, and assists the receptionists, plans and coordinates a variety of service functions that are related to the front desk operations and the healthcare team at the Companion Animal Hospital. This position also encompasses all of the duties of the receptionists. These functions include, but are not limited to, reception (client and phone), maintenance of veterinary medical records, accounts maintenance, cash processing, ordering of administrative supplies and equipment, data entry and retailing of veterinary sundry items. The Receptionist Team Leader is under the direct guidance and supervision of the Hospital Manager.

PRIMARY JOB RESPONSIBILITIES

- Train, supervise and assist the receptionists in their performance of a variety of administrative and public relations and client education duties which facilitate the work of the practitioners, technicians, kennel assistants, groomer(s) and the veterinary practice manager who directly or indirectly provides patient care. Ensure adherence to quality standards, deadlines, and proper procedures, correcting errors or problems.
- Oversee the screening and assembly of veterinary records and files for active use, storage or disposal in accordance with the established records control schedules.
- Oversee auditing of charts for completeness of information. Refer to the veterinary practice manager for questions concerning charges and/or treatment.
- Oversees the inventory and purchase of office supplies and forms storeroom, reorders supplies/informs the veterinary practice manager of the need for supplies to maintain pre-determined stock levels.
- Place routine service calls for maintenance of office equipment using predetermined vendors.
- Assist in the hiring process of reception team members, including reviewing candidates qualifications, phone interview, in person interviews and working interviews. Make hiring recommendations to the hospital manager.
- Create and maintain the team schedule, based on hospital needs, for the reception team.
- Provide guidance and direction to subordinates, including setting performance standards and monitoring performance. Direct on the job training. Make recommendations to the hospital manager concerning personnel matters and assist with follow through of disciplinary actions.
- Oversee and process monthly accounts receivables.
- Assist Hospital Manager in preparing and delivering quarterly/annual receptionist employee evaluations.
- Assist in conducting departmental meetings and schedule in-service meetings as deemed appropriate and necessary.
- Motivate and inspire the receptionist team to provide high quality care to the patients and clients of Companion Animal Hospital.
- Work well with all team members and ensure that your actions support the hospital, the doctors, and the practice philosophy.
- Maintain effective employee-management communication. Periodically review front desk operations for efficiency and accuracy. Make recommendations to the veterinary practice manager as to ways in which the front desk can be enhanced.
- Knowledgeable regarding related federal and state animal health laws and regulations including OSHA. Ensure that the hospital and the healthcare team are in compliance with regulations. Inform the veterinary practice manager of any regulatory issues.

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Receptionist Responsibilities

- Open the practice and set up for the morning as directed.
- Close the practice for the evening as directed.
- Clean and straighten the public areas of the practice including the front desk, reception area, waiting area, office, public bathroom and exam rooms.
- Welcome clients and patients to the practice with a professional, warm and friendly demeanor and provide for their comfort while they are in the practice. This includes greeting clients, offering drinks, showing them to waiting area, etc. Maintain an up-to-date magazine selection in the waiting area.
- Answer incoming telephone calls utilizing proper telephone etiquette. Screen those calls that are handled by other healthcare team members and take care of routine calls. Routine calls include those seeking information about veterinary services. Provide knowledgeable sub-professional advice concerning the care and treatment of animals including questions regarding hospital services, fees, animal care and treatment in accordance with hospital policies. Appropriately direct other questions and communication to a veterinarian, practice manager or other health care team member.
- Prepare to receive appointments by retrieving client records and preparing needed forms in advance of clients' arrival. Complete required forms such as new client form, patient visit form, client report, consent forms, estimates, payment agreements, etc and obtain all necessary information.
- Handle emergency situations by following established clinic policies and procedures in referring clients for immediate treatment of their animals when requests are accompanied by complaints of acute symptoms. Determine nature of injury/illness and attempt to reassure distressed pet owners.
- Follow hospital policies regarding patient admittance. Determine whether immunizations/tests are current. Recommend update of necessary immunizations/tests to clients.
- Notify doctors of patient arrival. Relay all necessary information to the doctors and technicians.
- Discharge patients which includes entering all charges into the computer, reviewing the discharge instructions and medications. Ensure that future reminders are set up in the computer system for the patient.
- Present clients with medications, instructions, new client kits and any other take home items.
- Review the services that were rendered to the pet (verbally itemize the client receipt) and inform client of the total amount due. Assure that owners meet all financial obligations or that acceptable arrangements have been made.
- Accept payments from the client. Accurately process cash, checks, charge card payments and credit account payments. Know fees for routine services.
- Help clients schedule appointments when referred to a specialist, including directions, records and test results to bring and follow up status of patient after specialty care.
- Ensure treatment plans are signed and an emergency number is noted.
- Clean up after patient accidents in the reception area, exam rooms and exterior sidewalks and parking lot.
- Promote practice protocols on wellness and prevention, including ancillary services such as grooming, training, acupuncture, etc.
- Schedule appointments for the clinic after obtaining all necessary data concerning the animal and owner. Prepare all required forms such as animal clinical records, health certificates, immunization certificates, lab reports, release forms and euthanasia certificates in advance, if possible.
- Fill veterinary prescriptions with appropriate medication, dispense medications including providing routine instructions to owners concerning prescribed medications.
- Perform over the counter selling of pet foods and supplies. Exercise a technical knowledge of products sold.
- Assist in the updating of client/patient files as needed including name, address, telephone numbers and vaccination and heartworm history
- Retrieve and re-file medical records accurately and promptly.
- Collect lab specimens from pet owners, match patient record to the sample and submit samples to nurse.

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- Offer professional compassion and support during difficult situations such as euthanasia
- Perform an end-of-day procedure each evening. This would include reconciling invoices and balancing the cash drawer, running end-of day computer reports, preparing the bank deposit and presenting the reports and deposit information to the practice manager or owner.
- Enter data into the computer system as required. Retrieve and modify stored records. Maintain health certificate and rabies certificate files, including sending copies to appropriate government agencies. Maintain medical records, including Client Communications, as directed.
- Prepare and send client correspondence such as email, fax, reminder cards and letters, thank you letters, sympathy cards and welcome-to-the practice letters/cards. Perform miscellaneous correspondence as needed.
- Send reminder notices to clients for periodic notifications. Make recalls to clients on a timely basis from a call back list.
- Perform a back up of the computer system on a regular basis as directed.
- Perform/oversee the performance of mailing daily business, hospital invoices, statements, taking care of collection accounts, maintaining accounts receivables, mailing accounts payable invoices, inventory control, and performing related tasks.
- As required, enter data into the computer system, retrieve and modify computerized records. The practice management software includes, but is not limited to, such areas as reminder list of patients for periodic notifications, receipt and/or invoicing to update medical/financial records; accounting to include the general ledger, accounts payable, accounts receivable, billing and aging of accounts, income distribution, inventory control, client records, patient records, medical records, time clock; word processing to produce letters for general correspondence and special mailings to clients, etc.
- Perform a variety of clerical duties, receiving, sorting, distributing mail, sending out mailings, cleaning, organizing reception area, type memos, correspondence, reports and other documents. Assist in the ordering, receiving, stocking and distribution of supplies.
- Work well with all team members and ensure that your actions support the hospital, the doctors, and the practice philosophy.
- Performs other duties as assigned.

CONTROLS OVER WORK

Works under the direct supervision of the veterinary practice manager, who will indicate general assignments, limitations and priorities. Recurring assignments are performed independently. Deviations or unfamiliar situations are referred to the supervisor. The Receptionist Team Leader uses initiative in carrying out recurring assignments independently without specific instruction, but refers deviations, problems, and unfamiliar situations not covered by instruction to the Practice Manager for decision or help. Work is reviewed in terms of adequacy of services provided and accuracy.

SKILLS AND KNOWLEDGE

- Requires knowledge of hospital procedures outlined in the current employee manual as well as those that are implied (reasonable expectations).
- Strong communication, leadership and motivation skills. Has the ability to effectively solve problems dealing with staff conflict to personnel issues and performance. Has the ability to direct, guide and assist a group of individuals.

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- Knowledge of principles and processes for providing client and personal services. This includes client needs assessment, meeting quality standards for services, and evaluation of client satisfaction.
- Ability to show unbiased judgment when managing people and makes fair and just recommendations in regards to personnel issues and/or disciplinary action.
- Possession of strong organizational skills.
- Excellent verbal and written communication skills. Possess exceptional interpersonal communication skills.
- Knowledge of hospital procedures and operating instructions for making appointments, assembling patient medical records, recording test results, relaying information regarding patient's condition, and compiling and submitting data on patients treated.
- Knowledge of the spelling and meaning of commonly used terminology of veterinary medicine to accurately record results of tests and file veterinary medical reports according to practice policies.
- Requires strong client service skills. Personal contacts are with pet owners affected by a variety of problems, visitors and other healthcare team members. Considerable tact and diplomacy is required. Must accurately relay owner's account of the medical complaint(s) of the pet(s) involved to the healthcare team member who will be involved in treating the patient(s).
- Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.
- Critical thinking - Understanding logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
- Ability to work independently on assigned tasks as well as to accept direction on given assignments.
- Knowledge of computers and relevant software applications including MS Office (Word), managing files and records, and other office procedures.

PHYSICAL EFFORT

The physical demands described here are representative of those that must be met by an employee to successfully perform the primary functions of this job.

- Frequently position self and move about the reception area to file, use office machinery such as fax machines and computer, and assist clients with merchandise.
- Often transports inventory to stock shelves. Frequently handling 30 pounds and occasionally handling 50 pounds.
- Often transports patients to weigh on scales
- Frequently required to communicate with clients, team members and associates. Must be able to exchange accurate information.

WORK ENVIRONMENT

While performing the duties of this job, the employee is exposed to hazards associated with aggressive patients; hazards associated with infected animals and controlled substances; exposure to unpleasant odors and noises; exposure to bites, scratches and animal wastes; possible exposure to contagious diseases.

COMPANION ANIMAL HOSPITAL CORE VALUES

Our team believes in and agrees to **Positivity, Service, Integrity, Communication, and Teamwork** to create a work environment that energizes team members to create value on behalf of our clients and patients.

Positivity – I choose positivity. I am excited about what I do and I will be all in. I will be present and engaged with clients, patients, and team members every day.

Service – I am dedicated to creating an exceptional client experience. I treat clients as partners and advocate for their pets.

Integrity – I am honorable. I respect all living things and I do the right thing when no one is watching.

Communication – I practice direct, honest communication with both clients and team members.

Teamwork – I will work together with my team enhancing each other's strengths and covering each other's weaknesses.

ESSENTIAL FUNCTIONS:

- Provide guidance and direction to subordinates, including setting performance standards and monitoring performance. Direct on the job training. Make recommendations to the hospital manager concerning personnel matters and assist with follow through of disciplinary actions.
- Oversee the screening and assembly of veterinary records and files for use.
- Professionally administer all phone calls - answering client inquiries in a prompt and friendly manner, scheduling appointments, recording messages.
- Requires strong communication and client service skills. Considerable tact and diplomacy is required. Ability to greet clients in a professional, friendly, hospitable manner - check clients in, discharge patients.
- Open and close practice.
- Ability to multi-task.
- Collect client fees, accurately post and record payments, make change, process credit card transactions and run end of day transactions.
- Perform a variety of clerical duties, accurately input data into computer software system, mailings, cleaning, organizing reception area, type memos, correspondence, reports and other documents.
- Regular attendance and timeliness are an essential function in order to fulfill the requirements of this position.
- The employee must be able to occasionally lift and/or move up to 50 pounds.