

# Position Description



**Position:** Administration Team Leader  
**Reports to:** Practice Manager  
**Memberships:** Practice Leadership Team  
Administration team

**Responsibilities:**

<b><i>Overall performance</i></b>	Self and Administration Team
<b><i>Supervision</i></b>	All members of the Administration Team
<b><i>Practice issues</i></b>	Refer to Practice Manager

**Functional Relationships**

<b><i>Internal</i></b>	Practice Manager Finance and Operations Manager Administrative Team members Practice Leadership Team members All other practice staff Tuwharetoa Health staff Allied health providers
<b><i>External</i></b>	Patients Visitors Business partners Other health professionals

**Main purpose of role:** The Administration Team Leader is a pivotal person for the Administration team.

The primary purpose of the role is to:

- be a highly skilled administrator and receptionist for the practice
- ensure the effective and efficient co-ordination, prioritisation, documentation and delivery of:
  - all patient and practice administrative tasks
  - all inbound and outbound telephone activity
  - reception duties
- supervise, develop, coach, mentor and performance manage all members of the administration team
- represent the administrative function in the practice leadership team

Practice management entrusts and delegates the smooth running of the Administration Team on a day to day basis and in line with the direction of the organisation.

Patients should feel that they have been dealt with in a friendly, courteous, fair and equitable manner and that all that can be done for them, has been done - and that it was done quickly and efficiently.

The internal focus is on delivering high quality and accurate administration and reception activity, creating a culture of customer centric performance as well as presenting a welcoming atmosphere at reception. The prioritising, organising and delegation of workload within the administration team, liaison

# Position Description



with other staff, policy and process development and systems improvement and maintenance are also important. The role also represents the administrative function at practice leadership level and contributes to solving issues that require attention to ensure the smooth running of the practice.

## Key Tasks

### 1. Leadership

#### 1.1 *Team leadership*

## Standards/Outcomes Expected

Creates an inspiring team environment with an open communication culture

Builds a culture where the patients' needs are at the centre of decision making and where tolerance and understanding of diversity (e.g. including ethnicity, gender, sexual orientation, socio-economic status, age, physical ability) is high

Works creatively with a focus on engaging the team to achieve goals and deliver outcomes through team centric problem solving

Flourishes in an agile environment – acting proactively to ensure smooth team operations and effective collaboration

Communicates effectively and calmly even under stress.

Leads by setting an strong personal example

Is a future builder – helping the team members navigate the future

Is a people builder – developing team members, identifying talent, recognising high performance and rewarding accomplishments

Is a deliverer – making things happen with and through others

Is a community member - recognising and being committed to the community we serve.

#### 1.2 *Practice leadership*

Proactively engages as a member of the practice leadership team

Proactively and collegiately problem solves within the practice leadership team

Is an advocate for patient and community needs at the practice leadership level

Contributes and promotes the administrative team perspective at the practice leadership level

# Position Description



Takes collective management responsibility for implementing decisions made within the practice leadership team

## 2. Reception management

### 2.1 *Receive and welcome*

The reception and waiting room areas provide an atmosphere of a warm welcome, are clean, safe and tidy, reflect a level of professional pride and are an informative environment for patients and visitors.

All visitors are received promptly and courteously

### 2.2 *Arrival*

All patients are indicated as 'arrived' in the patient management system (PMS)

The arrival process maximizes the opportunities presented to improve patient data, promote services and gain patient feedback.

### 2.3 *Communication and liaison*

Enquiries from patients, visitors and others are dealt with courteously and as quickly as possible.

Appointments are made accurately and according to guidelines.

Prescriptions requests are entered accurately and according to guidelines.

### 2.4 *Waiting Room management*

The waiting room is 'actively managed'. For example:

- Reception staff note patient waiting times and proactively intervene where necessary with effective communication
- Reception staff intervene with distressed, unwell or nervous patients
- Reception staff support patients and visitors to make their visit comfortable
- Reception staff ensure all patients have been arrived and communicate with doctors/nurses/other staff as necessary

The waiting room is kept clean, safe and tidy.

### 2.5 *Patient privacy*

Patient confidentiality at reception and in the waiting room is maintained at all times.

### 2.6 *Accounting*

Patients are charged accurately in accordance with charging guidelines.

All payments are processed and receipted in accordance with guidelines.

# Position Description



Banking is reconciled at the end of every shift and any discrepancies accounted for in accordance with guidelines.

Banking is to be completed at least once per week in accordance with guidelines.

All eligible patient subsidies are accurately entered and claimed (may also include claims processing).

## 2.7 *Personal security*

Money should be counted away from the front desk and out of sight of patients and visitors.

### 3. PAC (Patient Access Centre) Activities

#### 3.1 *Answering telephone*

All calls are answered within six (6) rings

#### 3.2 *Response to messages*

Accurate messages are recorded, including time, date, name of caller, phone number, message and initials of call taker.

All voice mail messages are responded to within one (1) hour or forwarded to the appropriate staff member

#### 3.3 *Appointments*

Accurate patient appointments are made according to guidelines

#### 3.4 *Prescription request*

Prescriptions requests are entered accurately and according to guidelines.

#### 3.5 *Patient registration*

New patients who wish to register with the practice are registered and enrolled in accordance with guidelines.

Notes are requested from previous provider.

Patients files are created in accordance with guidelines

#### 3.6 *Patient transfers*

Patients transferring out of the practice will be done following appropriate guidelines with notes being sent to new provider within ten (10) working days.

#### 3.7 *Patient details are updated*

Patient details are maintained and checked on a regular basis.

#### 3.8 *Document scanning*

Documents for scanning are to be processed within one (1) working day.

#### 3.9 *Email*

Email is monitored and actioned on the day it is received.

All patient email is to be acknowledged as having been received.

#### 3.10 *Filing*

Patient filing is to be processed within one (1) working day and accurately completed.

# Position Description



- 3.11 **Incoming mail** All incoming mail and faxes are dated and processed as they arrive.
- 3.12 **Outgoing mail** All outgoing mail is correctly addressed, stamped and posted each working day.
- 3.13 **Stationery supplies** Stock levels of stationery supplies are to be kept at an adequate level.  
  
The purchase of stationery and other office supplies is to be maintained within budget.

## 4. Human Resources

- 4.1 **Training of administration team members** Temporary gaps in administration team staffing are managed accordingly in conjunction with the Practice Manager.  
  
Reception and administration workflow and productivity is maintained with minimal disruption.  
  
All administration team members have their training needs assessed on a regular basis.  
  
All administration team members are trained to a required level of competency. This includes PAC, reception, PMS activities, general computer literacy and all relevant systems and processes.  
  
An induction programme for new administration team members is developed and implemented
- 4.2 **Reception and Admin descriptions and person specifications** All administration team members have position descriptions and person specifications appropriate to their role
- 4.3 **Payroll overview** Review and approve administration team timesheets before submitting for processing/payment  
  
Approving leave in conjunction with the Finance and Operations manager
- 4.4 **Motivation and oversight of administration team** First point of contact for any administration team problems or assistance required.  
  
Maintain a friendly, positive workplace environment.  
  
Maintain a professional standard of appearance and work practices within the administration team.  
  
Staff performance is monitored and managed in accordance with practice policy in conjunction with the Practice Manager.

# Position Description



Undertake and encourage self-directed training to deal with recurring problems.

4.5 **Performance and development reviews**

Performance and development reviews for all administration team members are conducted and recorded in compliance with practice policy

4.6 **Staff and leave rosters**

All administration team staff know when they are expected to be working, what they are tasked to do and are advised well in advance of any changes.

4.7 **Health and Safety**

Ensure the staff work in a safe environment and employ good health and safety practice.

Liaise with Health and Safety Officer for the practice

4.8 **Recruitment**

Involvement in the recruitment of new Administration Team members as directed by the Practice Manager.

## 5. **Business Management**

5.1 **Systems and processes**

All administrative tasks have agreed and documented systems and processes which are reviewed regularly and amended as necessary to ensure ongoing compliance to legislation and guidelines.

5.2 **Performance and quality measurements**

Key performance and quality measurements are to be set and agreed with the Practice Manager and reviewed regularly.

Individual team member and whole of team performance tracked against performance and quality measures.

Comprehensive and detailed reports about team performance against performance indicators are created and communicated to the Practice Manager, and where relevant, the rest of the practice team.

5.2 **Policies**

There are relevant policies for the activities of the Administration Team. These are to be approved by the Practice Manager and maintained in accordance to guidelines.

5.3 **Workflow management and tracking**

There is to be a clear process for managing the Administrative Team workflow which enables completion tracking, equitable distribution of workload between team members and achievement of performance and quality measures.

5.4 **Facilities management**

All office equipment is maintained in good working order.

5.5 **Troubleshooting**

All facilities, equipment, network or user problems are proactively dealt with and escalated where appropriate.

# Position Description



## 6. Communications

### 6.1 *Internal*

The Administration Team members are kept informed by way of regular communication as to the things that affect them and the practice in general.

Meetings are organized and minutes are kept of team meetings.

Daily attendance at the 'morning huddle' by the Administration Team Leader or delegate is required.

Attendance by the Administration Team Leader at practice leadership team meetings is required.

## 7. Compliance

### 7.1 *Health and Disability Commission*

Ensure all complaints are notified to the Practice Manager.

Undertake or assist in the investigation and completion of complaints in conjunction with the Practice Manager.

### 7.2 *Privacy Act & Health Information Privacy Code (HIPC)*

Ensure the Administrative Team members are trained in privacy and HIPC issues and ensure that these standards are maintained.

Undertake the role of Privacy Officer for the practice.

### 7.3 *Health & Safety*

Comply with all health and safety policies and processes within the practice.

Actively engage with hazard, risk and incident management.

Ensure all Administration Team members are aware and fully conversant with all health and safety policies and processes.

In conjunction with the Clinical Leads and Practice Manager ensure protocols are in place for when emergencies occur and assistance is required immediately. Ensure all Administration Team members are trained and competent in these protocols.

## 8. Other

### 8.1 *Other duties*

The Administration Team Leader will be asked from time to time to perform other tasks in order to maintain the smooth and effective service of the practice.

## Delegations

### *Financial*

Stationery and office supplies budget  
Cash handling  
Bank reconciliation  
Banking cash

### *Other*

Team member performance reviews