Medical Elective Bookings – Clerical Administrator, First Specialist Appointment

Position Description

Date: 11/04/2016

Job Title : Clerical Administrator, First Specialist Appointment

Department : Medical Elective Bookings

Location : Waitemata District Health Board

Reporting To : Administration Manager

Direct Reports : Not Applicable

Functional Relationships with 

- Internal
  - Patient Services Manager
  - Team Leaders Elective Bookings Department
  - Clerical Administrators
  - Systems Administrator/Educator
  - Clinical Staff
  - Referral Administrators
  - WDHB Outpatient Departments

- External
  - Patients
  - Patients’ families (with authorization from patients, in the first instance)
  - Primary Care Providers including GP’s
  - Other DHB providers
  - Ministry of Health

Purpose of the role : The effective administration of booking and scheduling of first specialist appointments for patients within the division of Medicine and Health of Older People so that referrals and WDHB waiting lists are managed within the recommended Ministry of Health and WDHB guidelines and appointments are planned and scheduled to ensure optimal utilisation of available appointment times

Our Purpose, Values and Standards

At the heart of Waitemata DHB is our promise of ‘better care for everyone’. This promise statement is the articulation of our three-fold purpose to:

1. promote wellness,
2. prevent, cure and ameliorate ill health and
3. relieve the suffering of those entrusted to our care.

At the heart of our values is the need for all of us to reflect on the intrinsic dignity of every single person who enters our care. It is a privilege to be able to care for patients, whānau and our community, a privilege that is sometimes overlooked in our day to day work.

Our standards and behaviours serve as a reminder to us all about how we are with our patients and with each other.
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*Position Description*

**everyone matters**

- Welcoming and friendly
- Respect and value each individual
- Take time to listen and understand
- Speak up for others

- Every single person matters, whether patients, clients, family members or staff members.

**with compassion**

- Compassionate for your suffering
- Attentive, helpful and kind
- Protect your dignity
- Reassuringly professional

- We see our work in health as a vocation and more than a job. We are aware of the suffering of those entrusted to our care. We are driven by a desire to relieve that suffering. This philosophy drives our caring approach and means we will strive to do everything we can to relieve suffering and promote wellness.

**connected**

- Communicate and keep people informed
- Explain so people understand
- Teamwork with patients, whānau, and colleagues
- Give and receive feedback

- We need to be connected with our community. We need to be connected within our organisation - across disciplines and teams. This is to ensure care is seamless and integrated to achieve the best possible health outcomes for our patients/clients and their families.

**better, best, brilliant**

- Positive we can make a difference
- Improve our service and ourselves
- Clean and safe practice
- Timely, efficient and organised

- We seek continuous improvement in everything we do. We will become the national leader in health care delivery.
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## Position Description

### PLACE IN THE ORGANISATION

![Organisation Chart]

### NATURE AND SCOPE OF RESPONSIBILITIES

| Waiting List Management                                                                 | • Accurate waiting lists are monitored and managed, as per the agreed business rules for medical booking and Ministry of Health requirements.  
|                                                                                       | • All requests for information relating to waiting lists are responded to accurately and within required timelines. |
| Virtual Appointment Management                                                        | • Patients are booked for “Virtual Specialist Appointment” (VFSA) according to the agreed business rules for medical bookings.  
|                                                                                       | • Close referrals when discharging virtual appointments  
|                                                                                       | • Process virtual appointments as soon as possible after grading and waitlist. |
| Appointment Scheduling Management                                                     | • Patients are booked for “First Specialist Assessment” (FSA) according to the agreed business rules for medical bookings.  
|                                                                                       | • All first specialist appointments must be booked within required timeframes. Any breach of time frames must be escalated to the operations manager who is to obtain clinical approval.  
|                                                                                       | • Appointments are booked in consultation with patients and are confirmed in writing.  
|                                                                                       | • Clinics are cancelled when advised by Administration. |
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**Position Description**

<table>
<thead>
<tr>
<th>Manager</th>
<th>Manager, patients are promptly contacted and appointments rescheduled.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>● Clinics are booked to profile; unless change has been authorised by Operations Manager.</td>
</tr>
<tr>
<td></td>
<td>● DNA (Do not arrive) patients are processed according to the agreed business rules for medical bookings.</td>
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<tr>
<td></td>
<td>● All patient requirements are tracked to ensure all pre-requested tests/investigations/procedures are completed prior to booking clinic appointment. (excluding Cardiology)</td>
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<tr>
<td></td>
<td>● Confidentiality of patient information is ensured by adhering to WDHB and departmental policies &amp; procedures.</td>
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<tr>
<td></td>
<td>● Patients must be called if their clinical grading is within 42 days or less and/or there appointment is 14 days or less</td>
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<tr>
<td></td>
<td>● Appointment are not to be booked more than 6 weeks out</td>
</tr>
<tr>
<td></td>
<td>● Bring e-referral up when booking FSA (even if not on e-triaging). Do an automatic double-check of contact details.</td>
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<tr>
<td></td>
<td>● Process for sending “Patient to Call” letters must be followed according to time line below</td>
</tr>
</tbody>
</table>

| Data Entry in the Patient Management System (PIMS) | Patient information is recorded in an accurate and timely manner. |
|---------------------------------------------------|-----------------------------------------------------------------
|                                                   | ● Patient demographics are checked on every contact and information immediately updated, as required. |
|                                                   | ● Able to correctly understand and use PIMS necessary to complete all the required tasks for the role. |

<table>
<thead>
<tr>
<th>Customer service</th>
<th>Responds to peoples appropriately and with effective results as outlined in Our Shared Values and Behaviours for WDHB</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>● Has a “Can do” attitude.</td>
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<tr>
<td></td>
<td>● Answers all telephone calls appropriately and attends to matters arising from phone queries in a prompt and courteous manner, minimising ongoing issues.</td>
</tr>
<tr>
<td></td>
<td>● Takes messages for co-workers when necessary.</td>
</tr>
<tr>
<td></td>
<td>● Takes ownership for patient enquiries, and at all times undertake to seek the answers. Only passes on if appropriate to do so.</td>
</tr>
<tr>
<td></td>
<td>● Regularly clears and deal with phone and written messages.</td>
</tr>
<tr>
<td></td>
<td>● Ensures answer phone messages are up to date</td>
</tr>
<tr>
<td></td>
<td>● Participates in continuous improvement initiatives and reviews and implementation of innovative customer service practices and policies.</td>
</tr>
</tbody>
</table>
|                   | ● Responds professionally, appropriately and with
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## Position Description

courtesy in all client interface situations including telephone and face to face communications.
- Ensures patient privacy and confidentiality are maintained in all interactions.
- Responds to patient requests for assistance and information or refer to appropriate professional discipline Physiology, Nursing or technical staff.

### Professional Development
- Demonstrates a continued commitment to learning.
- Participates in regular performance appraisals.
- Develops a portfolio when considered for Merit steps, consistent with offering the best service possible to the Elective Bookings function.
- Liaise with Medical Administration Manager about identifying relevant updates and training requirements.

### Professional Manner
- Has a professional and positive attitude at all times and projects this when working in the day-to-day environment
- Uses initiative appropriately
- Supports co-workers
- Adaptable and understanding of the ever-changing nature of the health environment relevant to the role
- Understands and demonstrates the WDHB values
- Conducts oneself in alignment with the Uniform and Presentation Standards Policy

### Teamwork
- Maintains open, effective and appropriate communication with the Elective Booking staff and stakeholders e.g. patients, clinical staff etc.
- Responds to request for information promptly and accurately.
- Keeps clear, accurate and relevant records.
- Participates at team meetings.
- Provides support to the booking and scheduling team where requested by manager, which may involve working across the medical services as and when required.
- Contributes as an active member of Patient Service Centre and in broader terms, the organisation as a whole.

### Other tasks required by the Team Leader to meet the overall purpose of the job
- All requested tasks are performed according to instructions.

### Reports/Data Integrity
- Understands and owns the data quality issues arising from own data input.
- Monitors and answers queries that arise from reports.
- Ensures all data is processed and completed correctly within the indicated time frames.
- Maintains an up to date and accurate desk file of the necessary tasks relevant to this position.
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Position Description

Statutory & Treaty of Waitangi obligations

- Ensures the professional and political integrity of WDHB by carrying out all functions in compliance of the Treaty of Waitangi and by demonstrating a serious commitment to keeping the treaty alive.
- Shows sensitivity to cultural complexity in the workforce and patient population

To recognise individual responsibility for workplace Health & Safety under the Health and Safety at Work Act 2015

- Contribute to a safe and healthy workplace at WDHB by:

  All Employees
  - Following & complying with H&S policies & processes & applying them to their own work activities, including using/wearing Personal Protective Equipment as required.
  - Participating in activities directed at preventing harm & promoting well-being in the workplace
  - Identifying, reporting & self-managing hazards where appropriate
  - Early and accurate reporting of incidents at work and raising issues of concern when identified.
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Position Description

Behavioural Competencies

Adheres to Waitemata District Health Boards 4 Organisational Values of:

- **Everyone matters**
  - Every single person matters, whether a patient / client, family member or a staff member

- **With compassion**
  - We see our work in health as a vocation and more than a job. We are aware of the suffering of those entrusted to our care. We are driven by a desire to relieve that suffering. This philosophy drives our caring approach and means we will strive to do everything we can to relieve suffering and promote wellness.

- **Connected**
  - We need to be connected with our community. We need to be connected within our organisation – across disciplines and teams. This is to ensure care is seamless and integrated to achieve the best possible health outcomes for our patients/clients and their families.

- **Better, best, brilliant**
  - We seek continuous improvement in everything we do. We will become the national leader in health care delivery.

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<th>Behavioural Competencies</th>
<th>Behaviour Demonstrated</th>
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<tr>
<td>Communicates and Works Cooperatively</td>
<td>• Actively looks for ways to collaborate with and assist others to improve the experience of the healthcare workforce, patients &amp; their families and the community &amp; Iwi.</td>
</tr>
<tr>
<td>Is Committed to Learning</td>
<td>• Proactively follows up development needs and learning opportunities for oneself and direct reports.</td>
</tr>
<tr>
<td>Is Transparent</td>
<td>• Communicates openly and engages widely across the organisation.</td>
</tr>
<tr>
<td></td>
<td>• Enacts agreed decisions with integrity.</td>
</tr>
<tr>
<td>Is Customer Focused</td>
<td>• Responds to people’s needs appropriately and with effective results</td>
</tr>
<tr>
<td></td>
<td>• Identifies opportunities for innovation and improvement</td>
</tr>
<tr>
<td>Works in Partnership to Reduce Inequality in Outcomes</td>
<td>Works in a way that:</td>
</tr>
<tr>
<td></td>
<td>• Demonstrates awareness of partnership obligations under the Treaty of Waitangi.</td>
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<td>• Shows sensitivity to cultural complexity in the workforce and patient population.</td>
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<td>• Ensures service provision that does not vary because of peoples’ personal characteristics.</td>
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<tr>
<td>Improves health</td>
<td>• Work practices show a concern for the promotion of health and well-being for self and others.</td>
</tr>
<tr>
<td>Prevents Harm</td>
<td>• Follows policies and guidelines designed to prevent harm.</td>
</tr>
<tr>
<td></td>
<td>• Acts to ensure the safety of themselves and others.</td>
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Note: This job description forms part of an individual’s contract of employment with WDHB and must be attached to that contract.
## Position Description

### PERSON SPECIFICATION

**POSITION TITLE:** Clerical Administrator, First Specialist Appointment

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<th>Preferred</th>
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<td><strong>Qualification</strong></td>
<td>• Completed 3 years of secondary school</td>
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| **Experience** | • 2 years customer service duties  
• 2 years administrative duties  
• Proven record in an admin position with a similar scope  
• Understanding of Windows including Microsoft Outlook and Excel  
• Proven experience working under pressure | • Experience in public health Booking and Scheduling  
• Understanding and proven experience with Microsoft Windows programmes |
| **Skills/Knowledge/Behaviour** | • Good command of the English language  
• Excellent telephone manner  
• Shows initiative and enthusiasm  
• Professional appearance  
• Excellent office administration skills.  
• Excellent communication skills and customer service practices.  
• Flexible, self-motivated, uses shows initiative and able to achieve expectations in a timely manner.  
• Positive manner, able to influence without conflict.  
• Calm, even, consistent and mature manner.  
• Confidential with a reputation for high integrity & discretion.  
• Able to work unsupervised.  
• Sensitive and constructive in responding to the needs of | • Health sector experience preferably within a Patient Management System application |
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<th>Team player with confident, collaborative approach in team practice.</th>
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<td>Sense of humour.</td>
<td>Sound data management skills including data entry, interpretation and analysis</td>
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- Sense of humour.
- Sound data management skills including data entry, interpretation and analysis.
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- Sound numerical skills.