

# JOB DESCRIPTION



THE ADAM PRACTICE

**Title:** Patient Services Clerk

**Responsible To:** Surgery Team Manager/Patient Services Lead

## Main Purpose of the Post:

The purpose of the role is to:

- Offer general assistance to the Practice team and project a positive and friendly image to patients and other visitors, either in person or via the telephone
- Receive, assist and direct patients in accessing the appropriate service or healthcare professional in a courteous, efficient and effective way
- Undertake a variety of administrative duties to assist in the smooth running of the Practice including the provision of secretarial and clerical support to clinical staff and other members of the Practice team
- Facilitate effective communication between patients, members of the primary health care team, secondary care and other associated healthcare agencies

It is the duty of each team member to assist in the smooth running of the Practice in general i.e. the Reception and office in particular. It is also the responsibility of each employee to make sure that whoever comes into contact with the practice, either in person or via the telephone, receives the highest standard of respect, courtesy, fairness and professionalism.

## Duties & Responsibilities of the Post:

The duties and responsibilities to be undertaken by members of the Practice administration team may include any or all of the items in the following list. Duties may be varied from time to time under the direction of the Surgery Team Manager/Patient Services Lead, dependent on current and evolving Practice workload and staffing levels:

### Data Entry;

- Read Coding information into the practice clinical system
- Auditing data collection standards in the practice
- Filing and retrieving paperwork
- Extraction of necessary data from clinical correspondence and input into Electronic Patient Record.
- File hospital letters and referrals.
- Scanning of letters and relevant correspondence into patient's notes.
- Report faults to IT & Quality Manager
- Maintain the appointments system
- Support and guide members of staff in the use of the computer system
- Ensure security of data at all times

### Reception Duties;

- Ensure that all patients and visitors at reception and telephone callers to the practice are greeted professionally and politely.
- Answer all incoming telephone calls promptly, divert them as appropriate and/or take and pass on messages via email or in person, ensuring the message gets to the recipient promptly.
- Ensure the telephone system is operational at the beginning of each day and is transferred to the OOH service at the end of each day.
- Maintaining and monitoring the Practice appointments system, ensuring all appointment times are used efficiently and details added into EMIS\visit books as necessary.
- Monitor flow of patients into waiting room and treatment rooms after booking in.
- Deal with all administrative telephone queries/requests from patients and act as liaison with the Doctors as necessary.
- Make appointments via the computerised system. Ensure total familiarity with the appointment system including regular and incidental variations. Monitor effectiveness of the system and report

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any problems or variations required to the IT & Quality Manager.

- Liaise with secondary care providers and arrange transport as necessary.
- Support and assist the Doctors during surgery times as required.
- Arrange interpreters as necessary.
- Assist patients with registrations and process the paperwork.
- Explain practice arrangement and formal requirement to new patients and those seeking temporary cover, ensure procedures are completed, including a new registration health check.
- Take name and address changes of patients and update the computerised system inline with Practice protocol
- Where possible verify patient contact details and update computerised record.
- Enter details of requests for home visits into visit book\emis session completing all relevant information and print visit request.
- Give test results where appropriate, X-rays, urine, swabs, blood, stool etc
- Advise patients of relevant charges for medical reports and other chargeable services, accept payment, issue receipts for same and record in patients notes.
- Daily preparation of Doctors' rooms and other clinics at the beginning and end of each clinical session.
- Ensure reception and waiting area are kept neat and tidy. Notice-boards and leaflet dispensers tidy and free from obstructions and clutter
- Opening up/locking-up of Practice premises and maintaining security in accordance with Practice protocols
- Have full understanding of SystmOne clinical system
- Have a basic working knowledge of all software and hardware in the surgery
- Assist the Practice in meeting its Quality Outcome Framework targets
- Initiating contact with and responding to requests from patients, other team member and associated healthcare agencies and providers

## **Clerical Duties**

- In conjunction with Prescriptions team ensure that requests for repeat prescriptions are generated accurately and efficiently, following practice protocol and set out for verification and signature of doctor, within the 48 hours specified by the practice and in accordance with Practice guidelines.
- Amend patient records or remove patients from the computerised system as requested by the Health Authority.
- Deal with all incoming and outgoing patient notes.
- Data entry of new and temporary registrations and relevant patient information e.g. smoking status, BP, ethnicity, medication from hospital letters.
- Scan all patient information in computerised record e.g. medical documents, hospital reports and letters as necessary.
- Retrieve paper notes as requested.
- Dispose of documents as appropriate being mindful of confidentiality at all times. Ensure all patient information not required is shredded.
- Photocopy documents as required.
- Action tasks as requested by clinical staff via Emis and email.
- Daily check of email and act upon.
- Follow practice procedure when medical reports are received.
- Type any letters as necessary.
- Ensure the checking of fax to make sure it is operational and has an adequate paper supply
- Processing and distributing incoming (and outgoing) mail
- Computer data entry/data allocation and collation; processing and recording information in accordance with Practice procedures
- Providing clerical assistance to Practice and Trust staff as required from time to time, including word/data processing, filing, photocopying and scanning
- Monitoring of stationery and other supplies; passing requests for orders to Surgery Team Manager

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## **Confidentiality:**

- As per both Government legislation and Practice policies ensure that all confidentiality, data protection and information governance policies and guidelines are followed and strictly adhered to. Reporting any infringements to the Operations Manager immediately.

## **Health & Safety:**

- Assist in promoting and maintaining own and others' health, safety and security as defined in the Practice Health & Safety Policy and related Risk Assessments.
- Participate in 6 monthly fire drills

## **Equality and Diversity:**

- Support the equality, diversity and rights of patients, carers and colleagues in line with Practice Policies.

## **Personal/Professional Development:**

The post-holder will participate in any training programme implemented by the Practice as part of this employment, such training to include:

- Participation in an annual individual performance review, including taking responsibility for maintaining a record of own personal and/or professional development
- Taking responsibility for own development, learning and performance and demonstrating skills and activities to others who are undertaking similar work.

## **Quality:**

The post-holder will strive to maintain quality within the Practice, and will:

- Alert other team members to issues of quality and risk
- Assess own performance and take accountability for own actions, either directly or under supervision
- Contribute to the effectiveness of the team by reflecting on own and team activities and making suggestions on ways to improve and enhance the team's performance
- Work effectively with individuals in other agencies to meet patients needs
- Effectively manage own time, workload and resources

## **Communication:**

The post-holder should recognize the importance of effective communication within the team and will strive to:

- Communicate effectively with other team members
- Communicate effectively with patients and carers
- Recognise people's needs for alternative methods of communication and respond accordingly.

## **Contribution to the Implementation of Services:**

The post-holder will:

- Apply Practice policies, standards and guidance
- Discuss with other members of the team how the policies, standards and guidelines will affect own work
- Participate in audit where appropriate

## **Any other delegated duties considered appropriate to the post.**

This job description is not intended to be exhaustive, but to indicate the main areas of responsibility. It may be changed after consultation with the post holder. The employee shares with the employer, the responsibility for review and modification of duties. Suggestions and discussions are welcome.

Policies and Procedures - the duties and responsibilities of the post will be undertaken in accordance with the policies, procedures and practices of the Practice, which may be amended from time to time. You are required to be flexible and the practice reserves the right to alter such fixed hours as may be considered necessary to ensure the surgery runs smoothly.

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<b>Person Specification:</b>		
	<b><i>Essential;</i></b>	<b><i>Desirable;</i></b>
<b>Skills</b>	<ul style="list-style-type: none"> <li>•Excellent Communication Skills (verbal and face-to-face)</li> <li>•Good People Skills</li> <li>•Excellent Telephone Manner</li> <li>•Attention to detail</li> <li>•IT skills</li> <li>•Good diplomacy skills</li> </ul>	<ul style="list-style-type: none"> <li>•Keyboard Skills</li> <li>•Problem solving</li> </ul>
<b>Knowledge</b>	<ul style="list-style-type: none"> <li>•Computer literate</li> </ul>	<ul style="list-style-type: none"> <li>•Local Knowledge</li> <li>•First Aid Knowledge</li> <li>•Knowledge of Word\Excel</li> <li>•Medical terminology</li> </ul>
<b>Experience</b>	<ul style="list-style-type: none"> <li>•Previous Reception\Administration Experience</li> <li>•Previous Customer service Experience</li> <li>•Ability to work as part of a team</li> </ul>	<ul style="list-style-type: none"> <li>•SystemOne Clinical System</li> <li>•Previous NHS experience</li> </ul>
<b>Personality</b>	<ul style="list-style-type: none"> <li>•Reliable</li> <li>•Adaptable</li> <li>•Be confident in dealing with difficult situations</li> </ul>	<ul style="list-style-type: none"> <li>•Sense of Humour</li> </ul>
<b>Other</b>	<ul style="list-style-type: none"> <li>•Neat and Tidy Appearance</li> <li>•Good general level of education</li> <li>•Good level of spoken English</li> <li>•Ability to handle sensitive information confidentially</li> <li>•Ability to self motivate, organise and prioritise workload\meet deadlines</li> <li>•Ability to use own judgment and commonsense.</li> <li>•Ability to work under pressure</li> <li>•Ability to work independently as well as part of a team and to use own initiative</li> <li>•Flexible approach and willingness to adjust to the needs of the practice</li> </ul>	<ul style="list-style-type: none"> <li>•Some local knowledge</li> <li>•Driving Licence</li> </ul>