**JOB DESCRIPTION**

**JOB TITLE: Patient Services Advisor**

**ACCOUNTABLE TO:** **Deputy Practice Manager/Practice Manager**

**AIMS OF THE POST**

To show high standards as a Patient Services Advisor. To be courteous, friendly, helpful and professional at all times to the patients. To present an efficient service to the patients both face to face and on the telephone. To maintain a smooth running reception area by undertaking your tasks promptly and efficiently.

You are the most important member of staff - you are the first point of contact - it is up to you to sell your surgery to the patients.

In the course of seeking treatment, patients entrust us with, or allow us to gather, sensitive information in relation to their health and other matters. They do so in confidence and have the right to expect that staff will respect their privacy and act appropriately. Maintenance of the highest level of patient, surgery and staff confidentiality is essential at all times.

**MAJOR DUTIES AND RESPONSIBILITIES OF THE POST**

**Reception Duties**

1. To receive requests (verbal and electronic) for appointments and services efficiently using practice systems and external support services. Signposting patients to other more suitable services as appropriate.

2. Monitor flow of patients into consulting rooms and treatment rooms.

3. Explain practice arrangements and formal requirements to new patients and those seeking temporary cover, ensure procedures are completed.

4. Advise patients of relevant charges for private services; accept payment and issue receipts for the same.

5. Respond to all queries and requests from patients and other visitors.

6. Enter requests for home visits into the computerised appointment book and include any relevant information and refer to the Duty Team.

7. Accept requests for prescriptions in person, via email and text services, making sure you record the details accurately and inform the patient of the processing and collection procedure.

8. Contact patients and external agencies as requested by members of the Primary Health

 Care Team.

9. Action requests for ambulance transportation for eligible patients.

10. Ensure waiting areas are kept neat and tidy at all times.

11. Gathering and recording of health information data as set by NHS contracts.

12.Be flexible and adaptable within the role of patient services advisor to encompass all aspects of the position.

13. To provide cover for members of the patient services team during periods of sickness and annual leave changing shifts where necessary.

14. To be willing to undertake any training as determined by the Practice Management Team.

**Management of Appointment System**

1. Ensure total familiarity with all appointment systems in effect including regular and incidental variations.

2. Book appointments ensuring sufficient information is recorded to retrieve medical records and prepare any relevant paperwork if necessary.

3. Monitor effectiveness of the system and report any problems or variations required.

**Management of Medical Records**

1. Ensure that all records are accurately assembled in advance for consulting sessions if required. Prepare test request forms as necessary. Ensure that the record is available for the Doctor in the instances of urgent consultation. Ensure the paper records and/or computer print outs are available for the Doctor for home visiting.

2. Retrieve and refile records as required, ensuring that strict alphabetical order is adhered to.

3. Ensure correspondence, reports, etc; are filed in correct order.

4. Ensure records are kept neat and tidy and in good repair with all necessary information recorded correctly on the outer cover.

**Preparation of Consulting Rooms**

1. Ensure the consulting rooms are prepared in readiness for each consulting session, checking full range of forms and requirements and re-stocking as required.

2. Ensure that the consulting rooms are checked at the end of each consulting session and left tidy and secure.

**Operation of Telephone System**

1. Receive and make calls as required. Divert calls and take messages as required. Ensure all messages are directed efficiently to the correct/most appropriate person.

2. Ensure the system is operational at the beginning of each day and switched over to answerphone at the end of each day.

**Start and End of Day Procedures**

1. Open premises at the start of day, set alarm to day function and make all necessary preparations to receive patients.

2. Secure premises at the end of day, ensure the building is totally secured, internal lights off and alarm activated.

Any other delegated duties considered appropriate to the post.

**Special Requirements of the Post**

1. An understanding, acceptance and adherence to the need for strict confidentiality.

2. An ability to use own judgement, resourcefulness, common sense and local

 knowledge to respond to patients' enquiries and requests.

3. Excellent communication skills.

4. Good IT skills – willing to undertake any additional training as the role indicates.

This list is not exhaustive but a guide to the work involved and may be subject to change as deemed necessary.

**Equality and Diversity:**

The post-holder will support the equality, diversity and rights of patients, carers and colleagues, to include:

Acting in a way that recognizes the importance of people’s rights, interpreting them in a way that is consistent with practice procedures and policies, and current legislation

Respecting the privacy, dignity, needs and beliefs of patients, carers and colleagues

Behaving in a manner which is welcoming to and of the individual, is non-judgmental and respects their circumstances, feelings priorities and rights.

**Health & Safety:**

The post-holder will assist in promoting and maintaining their own and others’ health, safety and security as defined in the practice Health & Safety Policy, to include:

Using personal security systems within the workplace according to practice guidelines

Identifying the risks involved in work activities and undertaking such activities in a way that manages those risks

Making effective use of training to update knowledge and skills

Using appropriate infection control procedures, maintaining work areas in a tidy and safe way and free from hazards

Reporting potential risks identified.

**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

Recognize people’s needs for alternative methods of communication and respond accordingly.

**PERSON SPECIFICATION**

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|  | **Essential** | **Desirable**  |
| **1. Qualifications** | A good standard of general education, including:* English and Maths at GCSE level or equivalent.

A demonstrable commitment to professional development  |  |
| **2. Experience**Previous experience of: | Experience of dealing with the public/patientsExperience of working with computer packages | Experience of EMIS clinical systemExperience of working in a GP practice or other primary care environment.Experience of working in a public reception environmentExperience of telephone switchboard operation |
| **3. Knowledge/Skills** | Excellent communication skillsExcellent It and keyboard skillsAbility to work without direct supervision and determine own workload priorities |  |
| 4. Qualities/Attributes | An understanding, acceptance and adherence to the need for strict confidentialityAbility to use own judgement, resourcefulness and common senseAbility to work as part of an integrated multi-skilled teamPleasant and articulateAble to work under pressureAble to work in a changing environmentAble to use own initiative | Leadership and management  |
| **5. Other** | Flexibility of working hours/ able to work at the desired times | Experience of Primary Care |