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**Job description & person specification**

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| **Job Title** | Patient Advisor |
| **Line Manager** | Patient Services Supervisor |
| **Accountable to** | Operations Manager |
| **Hours per week** | 25 hours a week  Monday – Friday  13:30 – 18:30 |

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| **Job Summary** |
| The Patient Advisor is responsible for welcoming patients and visitors to the surgery offering guidance, advice, and Care Navigation in line with the Standard operating procedure (SOP). The Patient advisor will also process outgoing communication to patients, undertake ID checks and take payments for private services.  You will also work in our care navigation hub taking calls from patients and signposting them to the most appropriate healthcare professional or service, working as part of the practice’s multidisciplinary team. |

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| The following are the core responsibilities of the Patient Advisor. On occasions there may be a requirement to carry out other tasks which are listed below under Secondary responsibilities. This will be dependent on factors such as workload and staffing levels:   1. To meet and greet patients and visitors to the practice and deal with face to face requests for appointments and follow up appointments. 2. To effectively signpost patients to the appropriate healthcare professional or service in line with the Care Navigation SOP 3. To process all outgoing calls and texts to patients. 4. Check ID for new patient registrations or Patients requesting or collecting documentation from the surgery. 5. Take payment for private services and provide appropriate receipt to confirm payment. 6. Answer incoming phone calls, transferring calls or dealing with the callers’ requests appropriately 7. Process patient requests for appointments and telephone calls and effectively signpost patients to the appropriate healthcare professional depending on the presenting condition 8. Initiate contact with and respond to requests from patients, team members and external agencies by phone, email and text 9. Data entry of temporary registrations and relevant patient information as required 10. Input data into the patients’ healthcare records as necessary 11. Manage all queries as necessary in an efficient manner 12. Maintain a clean, tidy, effective working area at all times 13. Support all clinical staff with general tasks as requested (appropriate to role) 14. Undertake all mandatory training and induction programmes 15. Attend a formal appraisal on an annual basis and participate in interim reviews to ensure objectives are achieved and relevant training is undertaken. 16. Contribute to public health campaigns (e.g. flu clinics) through advice or direct care |

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| **Secondary responsibilities** |
| In addition to the primary responsibilities, the Patient Advisor may be requested to:   1. Participate in practice audit as directed by the audit lead 2. Support Care Navigation staff, providing cover during staff absences 3. Action incoming emails, tasks, texts when necessary 4. Complete opening and closing procedures in accordance with the duty rota |

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| **Person Specification – Patient Advisor** | | |
| **Qualifications** | **Essential** | **Desirable** |
| Educated to GCSE level or equivalent | ✓ |  |
| GCSE Mathematics & English (C or above) |  | ✓ |
| Medical Terminology |  | ✓ |
| Customer Service qualification |  | ✓ |
| **Experience** | **Essential** | **Desirable** |
| Experience of working with the general public | ✓ |  |
| Experience of working in a health care setting |  | ✓ |
| **Skills** | **Essential** | **Desirable** |
| Excellent communication skills (particularly telephone) | ✓ |  |
| Strong IT skills | ✓ |  |
| Clear, polite telephone manner | ✓ |  |
| Competent in the use of Office and Outlook | ✓ |  |
| EMIS user skills |  | ✓ |
| Effective time management (Planning & Organising) | ✓ |  |
| Ability to work as a team member and autonomously | ✓ |  |
| Good interpersonal skills | ✓ |  |
| Problem solving & analytical skills | ✓ |  |
| Ability to follow policy and procedure | ✓ |  |
| **Personal Qualities** | **Essential** | **Desirable** |
| Polite and confident | ✓ |  |
| Flexible and cooperative | ✓ |  |
| Motivated | ✓ |  |
| Forward thinker | ✓ |  |
| High levels of integrity and loyalty | ✓ |  |
| Sensitive and empathetic in distressing situations | ✓ |  |
| Ability to work under pressure | ✓ |  |
| **Other requirements** | **Essential** | **Desirable** |
| Flexibility to work outside of core office hours | ✓ |  |
| Disclosure Barring Service (DBS) check | ✓ |  |

This document may be amended following consultation with the post holder to facilitate the development of the role, the practice and the individual. All personnel should be prepared to accept additional or surrender existing duties, to enable the efficient operation of the practice.