

**SCHEDULE A
POSITION DESCRIPTION
PRACTICE MANAGER**

NAME:

RESPONSIBLE TO: Managing Partners

FUNCTIONAL RELATIONSHIPS WITH:

Internal - Reception staff
Doctors
Nurses
Other health providers

External - Patients
Visitors
Other health professionals

MAIN PURPOSE OF THE JOB:

The Practice Manager is a pivotal person in the medical centre environment, as they are responsible for co-ordinating the majority of non-medical tasks in the practice.

The principal GP owners entrust and delegate the running of the practice on a day to day basis and in line with the direction of the business.

Patients should feel that they have been dealt with in a friendly, courteous manner and that all that can be done for them, has been done. "Going the extra mile" is our philosophy.

The internal focus is delegation of workload and liaison with staff, policy and process development, systems development and maintenance, and any other issues that require attention.

Key Tasks			Standards/Outcomes Expected
1		Human Resources	
	1.1	Recruitment and training of staff	Positions filled quickly with appropriate type of person. Temporary gaps in staffing are managed accordingly. Workflow and productivity is maintained with minimal disruption. Assess training needs for all staff on a regular basis. All staff are trained to a required level of competency.
	1.2	Position descriptions and person specifications	All staff have position descriptions and person specifications appropriate to their role.

	1.3	Employment Agreements and negotiations	All staff have Employment Agreements that are up to date with current legislation. Manager is up to date with current employment legislation and best practice.
	1.4	Payroll overview	Overview of wage rates and accurate payments made.
	1.5	Staff Holidays and sick leave	Liaise with staff re holidays taken and sufficient cover organised for this and sick leave.
	1.6	Motivation, management and discipline of all staff	First point of contact for any staff problems or assistance required. Maintain a friendly, positive staff workplace environment. Staff performance is monitored and managed in accordance with practice policy.
	1.7	Health and Safety	Health and Safety Officer for the practice. Ensure the staff works in a safe environment and employ good health and safety practice.
2		Business Management	
	2.1	Financial Management	Overview of all financial management of the practice. Liaison with practice accountant and assistance with preparation of annual accounts. Accurate and timely preparation of GST/TAX/PAYE/KIWI SAVER reports for IRD. Financial and management reporting to practice owners completed within agreed timeframes. Overview of credit management is maintained and bad debts are kept to a minimum.
	2.2	Develop and maintain office systems and protocols	In conjunction with administrative staff, develop suitable protocols and processes. These are reviewed on a regular basis.
	2.3	Develop and maintain clinical protocols	In conjunction with medical and nursing staff assist in developing clinical protocols that ensure safe, compliant patient treatment practice.
	2.4	Implement and maintain quality management systems	In conjunction with all staff, develop and review quality management systems.
	2.5	Risk management	Risks are identified and mitigated.
	2.6	Business Development	Opportunities for business development are identified and reported to the practice owners. Opportunities, once approved are then explored and implemented according to owners' instructions.

3		IT System Management	
	3.1	Disaster Recovery Processes	Back-up processes are in place and maintained accordingly to agreed guidelines. Regular testing of back-up reinstatement is completed to agreed guidelines.
	3.2	Training and development	All staff are trained in the use of the practice management system.
	3.3	Troubleshooting	All network issues and user problems are dealt with within agreed timeframes.
	3.4	IT licenses and Internet access	All software licenses are held and upgraded as necessary. The integrity and security of the practice IT system is maintained at all times.
	3.5	Strategic overview	Strategic overview of the capability and any issues that influence the usability of the IT system. Maintenance and replacement of components and peripherals as required.
4		PHO Management	
	4.1	Patient PHO enrolment	Overview of patient enrolment to ensure funding opportunities are maximised.
	4.2	Age/Sex register	Overview of accuracy of the register to ensure funding opportunities are maximised.
	4.3	PHO Reporting	Reports are completed within agreed timeframes.
	4.4	GP Owners	Practice owners are kept up to date on any issues that affect their funding streams.
5		Communication	
	5.1	External	Patients receive regular information by way of practice newsletters, about changes or new services that affect them. Practice brand and profile is marketed according to agreed guidelines. Maintain good working relationships with all suppliers.
	5.2	Internal	All staff and owners are kept informed by way of regular communication as to the things that affect them within the practice. Meetings are organized and minutes are kept of all staff and team meetings.

6		Facilities Management	
	6.1	Property Management	Leases and all required documentation is held for sublet consulting rooms and rent of property. Liaison with practice solicitors as necessary.
	6.2	Security	Overview of all external and internal security procedures to ensure staff and patient safety.
	6.3	Property maintenance	All buildings, car parks, gardens and facilities are kept to agreed standards.
	6.4	Equipment maintenance	All medical equipment and office equipment is maintained in good working order. A register of scheduled maintenance required for medical equipment is maintained and utilised.
7		Compliance	
	7.1	All subsidy schedules	Overview of accuracy of all claims made and payments received.
	7.2	Health & Disability Commission	Ensure all complaints are dealt with in a professional and empathetic manner, within agreed time frames. Appointment of Complaint Officer
	7.3	Privacy Act	Training of all staff in privacy issues and ensuring these standards are maintained. Appointment of Privacy Officer.
	7.4	Health & Safety	Hazard register and maintained and regularly updated. Fire and evacuation plan in place and regularly practiced. Protocols are in place for when emergencies occur and assistance is required immediately. Comply with current NZ legislation.
8		Other	
	8.1	Other duties	The Practice Manager will be asked from time to time, to perform other tasks in order to maintain the smooth and effective service of the practice.

Key Tasks			Standards/Outcomes Expected
1		Reception Management	
	1.1	Receive and welcome	All visitors are received promptly and courteously.
	1.2	Arrival	All patients are indicated as 'arrived' in the PMS system.
	1.3	Answering telephone	All calls are answered within 4 rings.
	1.4	Message taking	Accurate messages are recorded, including time, date, name of caller, phone number, message and initials of call taker.
	1.5	Appointments	Accurate patient appointments are made according to guidelines.
	1.6	Communication and liaison	Enquiries from patients, visitors and others are dealt with courteously and as quickly as possible.
	1.7	Patient registration	New patients who wish to register with the practice are registered and then enrolled with the PHO in accordance with guidelines. Patient notes are requested from previous provider. Patient file made up and put in the filing system. Patient details entered into the computer system.
	1.8	Patient details are updated	Patient details are maintained and checked on a regular basis.
	1.9	Patient transfers	Following the appropriate guidelines, patients transferring out of the practice will have their medical notes sent to their new provider within 5 days.
2		Waiting Room	
	2.1	Patients are informed	Patients are informed as to any delays occurring.
	2.2	Waiting room monitored	Waiting room is monitored to ensure all patients have been arrived and that there are no problems. Patients who seem very ill or upset are to be taken to a nurse's room for privacy, and the nurse alerted.
	2.3	Kept clean and tidy	Waiting room and children's play area is kept clean and tidy.
3		Accounting	
	3.1	Patients are charged	Patients are charged accurately in accordance with charging guidelines.
	3.2	Payments are receipted	All payments are processed and receipted in accordance with guidelines.
	3.4	Subsidy schedules	All eligible patient subsidies are accurately entered and

			claimed weekly.
4		Office	
	4.1	Filing	Patient filing is accurately completed within 24 hours of being put in filing tray. Patient files are kept in the appropriate order categorized and in chronological order.
	4.2	Incoming mail	All incoming mail and faxes are dated and processed as they arrive.
	4.3	Outgoing mail	All outgoing mail is correctly addressed, stamped and put in mail bag for postage.
	4.4	Document scanning	Documents are scanned within 24 hours of being put in the scanning basket.
	4.5	Email	Email is monitored and actioned on the day it is received. All patient email to be acknowledged as having been received.
	4.6	Stationery and supplies	Stock levels of stationery and kitchen supplies are kept at an adequate level.
5		Privacy and Security	
	5.1	Patient confidentiality	Patient confidentiality is maintained at all times. Any information or document with a patient name or readily identifiable information must be kept confidential and not be able to be seen by members of the public or other visitors. Patient details are not to be discussed - the exception to this is where it is in relation to a particular request or task required.
	5.2	Personal security	Money should be counted away from the front desk and out of sight of patients or visitors. Be aware of security, i.e. ensure doors that are not required for patient access are locked when not in use, i.e. back doors and side entrance doors.
6		Training and Development	
	6.1	Training needs	Training needs will be assessed on a regular basis, and staff will be required to attend internal and external training seminars and courses accordingly.

Date this document was initially agreed upon:

Next review date: