**Patient Services Team Leader**

**Job Description & Person Specification**

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| **Job Title:** | Patient Services Team Leader |
| **Line Manager:** | Practice Manager |
| **Accountable to:** | Business Manager |
| **Hours per week:** | Full time / Part time (32 – 37.5 hours per week) |
| **Rate of Pay:** | Depending on experience  |

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| **Job Summary:** |
| The post holder will be a member of the Management Team working under direct supervision of the Practice Manager and **must have previous primary care experience**. This is a varied role and much of the work undertaken will be of a highly confidential and sensitive nature. The successful applicant must have the ability to work well under pressure, communicate at all levels and will have responsibility for the effective, efficient and safe practice of the Care Navigation and Clinical Administration teams within the Practice. Responsibilities for this role will include day to day staff management, auditing, training, mentoring and some HR responsibilities such as appraisal, annual leave approval and return to work forms. The successful applicant will need to have a background in and working knowledge of Primary Care including the IT systems, such as SystmOne, AccuRx, TeamNet, Excel, Word, E-mails etc.The post holder will be responsible for monitoring and advising on workflow and effectiveness, dealing with patients and staff, signposting to external and internal services and generally providing a high standard of patient liaison. They will be able to demonstrate excellent verbal and written communication skills, be able to organise and prioritise a busy workload and work to tight deadlines whilst maintaining confidentiality and demonstrating tact and diplomacy. Attention to detail is of paramount importance as there will be a high level of contact with patients and their individual data. Some data will be of a highly sensitive nature. The post holder will need to be able to work within and understand the importance of policies and procedures around patient information, data sharing, information governance and confidentiality.Please be aware that this job is demanding. You will be dealing with patients who are ill and potentially stressed. You will be their first port of call. Empathy and understanding with a willingness to help provide a solution following Practice Protocols is the key to this very important role. |

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| **Primary responsibilities:** |
| To work under the guidance of and in conjunction with the Practice Manager on the following:-* To manage and take responsibility for the Care Navigation and Clinical Administration teams, ensuring PDPs and CPD are undertaken in line with the Practice strategy and vision.
* To manage and take responsibility for holiday and rota planning and have a proactive approach to sickness/absences and completion of return to work documentation for the teams in line with Practice Policies and Practice Manager.
* To undertake regular team meetings and complete reviews / appraisals in line with Practice policy.
* To be the first port of call for any query or concern for the non-clinical teams with support from Business Manager / Practice Manager.
* To effectively manage, support and mentor the non-clinical teams and their functions and backfill where there are gaps in service requirement.
* To create, review and implement practice policies and procedures surrounding the non-clinical teams.
* Inform Partners / Practice Manager / Business Manager of pressures / difficulties / problem areas when aware.
* To attend or present at Practice Meetings, Management Meetings as necessary.
* Support effective communication channels between the whole team.
* To have knowledge of all roles and responsibilities of the non-clinical teams to provide guidance and aid individual and team developments.
* To have a good understanding of SystmOne, Ardens, ICE etc and their functions to ensure efficient ways of working are adopted.
* Develop a sound understanding of the appointments system, services available and signpost / navigate where necessary to provide excellent patient care.
* Ensure an effective and efficient Care Navigation service is provided to patients and any other visitors to the practice.
* Have a good understanding of QoF, Enhanced Service Claims, PCN DES including IIF Performance.
* Actively undertake and participate in relevant audit topics in conjunction with Management Team.
* Receive, assist and direct patients in accessing the appropriate service or healthcare professional in a courteous, efficient and effective way.
* Provide 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.
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| **Secondary Responsibilities:** |
| **Care Navigation*** Act as first point of contact for more complex enquiries from patients and complaints in accordance with the Practice complaints procedure.
* Responsible for operating all procedures in reception and the waiting rooms including ensuring the notice boards and waiting room screen is kept up to date and relevant and updated regularly in line with national campaigns and seasonal information.
* Oversee and monitor the booking of appropriate appointments and visits for the patient where possible in line with national and local referral guidance and pathways and ensure these are completed within the timescales specified within the referral policy and protocol.
* Using your own judgment and communication skills ensure that patients with no prior appointment, but who need urgent consultation are seen in a calm logical and non-disruptive manner.
* Ensure appointment system is being utilised correctly for all services and signposting/navigation to alternative services where appropriate i.e. Pharmacy First, Home Visiting Service, Enhanced Access, Ragsdale etc.
* Ensure that there is timely answering of the telephones and to the required standard.
* Ensure practice policies are followed, and accurate records are kept, with particular reference to: appointments, messages, visits, post, patient registration, repeat prescriptions, filing systems, births and deaths.
* Clinical safety netting of pathology results where a clinician has indicated an action needs to be taken i.e. repeat test or book an appointment.
* Ensure Processes are in place for prescription queries; send appropriate queries onwards to relevant GP / Prescriber.
* Identify medication changes on secondary care discharge letters, out-patient letters and other correspondences, make changes to the repeat prescription and forward these to the doctor (s) for full authorisation, making clear that these are changes and always with a copy of the original letter for reference.
* Liaise with practice pharmacist / pharmacies on the supply of prescribed drugs, alert our clinicians of any supply issues and forward information on the recommended alternatives.
* Liaise with other members of the primary health care team, outside agencies and practice volunteers as required.
* Open up premises at the start of the day when first to arrive, de-activate alarm and make all necessary preparations to receive patients.
* When last to leave at the end of the day, ensure that the building is totally secured, internal lights are off and the alarm activated.
* General care navigation duties, roles and responsibilities.

**Clinical Administration*** Effective management of the Clinical Procedures Waiting Lists not limited to Coils/Implants, Minor Surgery, Joint Injection, HRT and Contraceptive Clinics.
* Oversee the process for registering new, temporary or GMS patients, registrations can be received electronically or via paper.
* Overseeing the updating of patient demographics i.e. addresses, contact information and liaise with patients where discrepancies are found through PDS updates or informed by relevant persons.
* Monitor GP2GP actions and rectify degraded entries where patient records are shared via SystmOne.
* Oversee the GP EDI Administration Links to ensure the Spine is updated and holds up to date patient information.
* Oversight that patients' access rights are updated where requested, including full and partial records access, proxy access, ability to manage appointments and prescriptions.
* The overseeing and audit of generating referral letters, reports and requests (NHS and private) i.e. two week wait (2WW), urgent, routine, private, advice and guidance referrals etc prioritising referrals in line with the referral policy and protocol.
* Ensure the referral guide is kept up to date with services, departments and supporting referral information such as proformas and share updates with the wider team when necessary.
* Ensure the re-allocation of pathology results in line with practice policy and that the filing of bowel screening and cytology results are completed in line with practice policy.
* Overall responsibility for the processing and auditing of hospital correspondence/letters in medical records to current procedural standards including but not limited to importing / scanning letters, matching to the patient record and coding relevant diagnoses, procedures etc.
* Process hospital correspondence/letters in medical records to current procedural standards including but not limited to importing / scanning letters and matching to the patient record.
* Support the invitation, management and review of QoF, IIF and Enhanced Services recalls, such as but not limited to: long term conditions, coils and implants, minor surgery and other monitoring requirements for patient conditions.
* Support the implementation, review and monitoring of recall processes including drug monitoring.
* General clinical administration duties, roles and responsibilities.

**General Responsibilities** * Monitor to ensure that the generic task in boxes and NHS mail accounts are kept up to date with requests actioned and responded to.
* You will be expected to participate in the induction plan for all new staff members whatever their role may be as requested by Management
* You will be expected to take part in the training programme for any new or role changing staff members as requested by Management
* Support the review and updating of relevant policies and procedures relevant to the role.
* Support the review and updating of relevant TeamNet topic pages and contacts relevant to the role.
* Input/maintain patients’ clinical data on the clinical computer system.
* Maintain close and effective communication with colleagues.
* Undertaking continuing professional development in line with practice requirements.
* Act as a role model to reception staff, supporting, motivating and promoting good staff and patient relations.
* Undertake any projects deemed appropriate and role relevant by the Business Manager or Practice Manager.
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| **Generic Responsibilities** |
| All staff at have a duty to conform to the following:**Equality, Diversity & Inclusion (ED&I)**A good attitude and positive action towards ED&I creates an environment where all individuals are able to achieve their full potential. Creating such an environment is important for three reasons: it improves operational effectiveness, it is morally the right thing to do, and it is required by law.Patients and their families have the right to be treated fairly and be routinely involved in decisions about their treatment and care. They can expect to be treated with dignity and respect and will not be discriminated against on any grounds including age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex or sexual orientation. Patients have a responsibility to treat other patients and our staff with dignity and respect.Staff have the right to be treated fairly in recruitment and career progression. Staff can expect to work in an environment where diversity is valued and equality of opportunity is promoted. Staff will not be discriminated against on any grounds including age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex or sexual orientation. Staff have a responsibility to ensure that they treat our patients and their colleagues with dignity and respect.**Safety, Health, Environment and Fire (SHEF)**This practice is committed to supporting and promoting opportunities for staff to maintain their health, well-being and safety. You have a duty to take reasonable care of H&S at work for you, your team and others and to cooperate with employers to ensure compliance with H&S requirements. All personnel are to comply with the Health and Safety at Work Act 1974, Environmental Protection Act 1990, Environment Act 1995, Fire Precautions (workplace) Regulations 1999 and other statutory legislation. **Confidentiality**This practice is committed to maintaining an outstanding confidential service. Patients entrust and permit us to collect and retain sensitive information relating to their health and other matters pertaining to their care. They do so in confidence and have a right to expect all staff will respect their privacy and maintain confidentiality at all times. It is essential that if, the legal requirements are to be met and the trust of our patients is to be retained that all staff protect patient information and provide a confidential service. **Quality & Continuous Improvement (CI)**To preserve and improve the quality of our output, all personnel are required to think not only of what they do, but how they achieve it. By continually re-examining our processes, we will be able to develop and improve the overall effectiveness of the way we work. The responsibility for this rests with everyone working within the practice to look for opportunities to improve quality and share good practice.This practice continually strives to improve work processes which deliver health care with improved results across all areas of our service provision. We promote a culture of continuous improvement, where everyone counts and staff are permitted to make suggestions and contributions to improve our service delivery and enhance patient care. **Induction Training**On arrival at the practice all personnel are to complete a practice induction programme. **Learning and Development**The effective use of training and development is fundamental in ensuring that all staff are equipped with the appropriate skills, knowledge, attitude and competences to perform their role. All staff will be required to partake and complete mandatory training as directed by the training coordinator, as well as participating in the practice training programme. Staff will also be permitted (subject to approval) to undertake external training courses which will enhance their knowledge and skills, progress their career and ultimately, enable them to improve processes and service delivery. **Collaborative Working**All staff are to recognise the significance of collaborative working. Teamwork is essential in multidisciplinary environments. Effective communication is of paramount importance and all staff must ensure they communicate in a manner which enables the sharing of information in an appropriate manner.**Service Delivery**Staff at Newhall Surgery must adhere to the information contained with practice policies and regional directives, ensuring protocols are adhered to at all times. Staff will be given detailed information during the induction process regarding policy and procedure. **Security**The security of the practice is the responsibility of all personnel. Staff must ensure they remain vigilant at all times and report any suspicious activity immediately to their line manager. Under no circumstances are staff to share the codes for the door locks to anyone and are to ensure that restricted areas remain effectively secured.**Professional Conduct**At Newhall Surgery, staff are required to dress appropriately for their role. Administrative staff will be provided with a uniform whilst clinical staff must dress in accordance with their role.**Leave**All personnel are entitled to take leave. All staff will be encouraged to take all their leave entitlement.  |
| **Person Specification – Patient Services Team Leader** |
| **Qualifications** | **Essential** | **Desirable** |
| RSA II audio-typewriting/typewriting (or equivalent /demonstrable experience) |  | ✓ |
| Good standard of education with excellent literacy and numeracy skills | ✓ |  |
| City and Guilds/AMSPAR Qualification |  | ✓ |
| **Experience** | **Essential** | **Desirable** |
| Previous managerial experience  | ✓ |  |
| Experience of working with the general public | ✓ |  |
| Experience and understanding of medical terminology |  | ✓ |
| NHS/Primary Care General Practice experience | ✓ |  |
| Experience of taking and producing notes of meetings and appraisals  | ✓ |  |
| **Skills** | **Essential** | **Desirable** |
| High levels of confidentiality | ✓ |  |
| Excellent communication skills (written and oral) | ✓ |  |
| Strong IT skills (generic) including powerpoint, word and excel | ✓ |  |
| Ability to prioritise, delegate and work to tight deadlines in a fast-paced environment | ✓ |  |
| EMIS / SystmOne / Vision user skills |  | ✓ |
| Effective time management (Planning & Organising) | ✓ |  |
| **Personal Qualities** | **Essential** | **Desirable** |
| Polite and confident | ✓ |  |
| Flexible and cooperative | ✓ |  |
| Excellent interpersonal skills | ✓ |  |
| Motivated and proactive | ✓ |  |
| Ability to use initiative and judgement  | ✓ |  |
| 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 | ✓ |  |
| Maintains confidentiality at all times | ✓ |  |
| Full UK driving licence |  | ✓ |

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 running of the practice.