**Trainee Administration Team Member
Position Description**

### Position Title: Trainee Administration Team Member

### Position Holder:

### Prepared: July 2023

### Reporting To: Clinic Manager - Olivia Leahy

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#### **Purpose of Role**

* The role of Trainee Administration Team Member encompasses the roles and responsibilities as listed below to keep people healthy, happy & comfortable as part of the Be Podiatry team!

**Expectations**

Position specific expectations

* You are expected to create wow experiences for people whilst doing the “normal stuff” that is expected of you:
	+ Greeting patients
		- We greet our patients within 3 seconds of them entering the reception area
		- We make eye contact, greet them with their name (ideally), a smile on our face and a smile in our voice
		- We make the reception area a warm, friendly, positive and welcoming place to be!
	+ Answering the phone
		- with a smile on your face and in your voice
		- answering the phone after 2 rings and before it rings out
		- returning voice messages as an absolute priority (#asap so we catch them before they call elsewhere!)
		- using phone scripts to create solutions for our patients and our team
		- Ensuring we try to return a message twice and then follow with a text message
	+ Making appointments
		- using Cliniko to make and reschedule appointments for our patients
		- we do everything we can to be sure we are accurate with our appointment making
	+ Rebooking/Rescheduling rather than canceling
		- We re-book patients rather than having them cancel (every time where we can!) to create the best outcomes for our patients and our team.
	+ Processing payments
		- We accurately process payments for our patients in an easy, efficient and timely manner to optimize the wow experience!
	+ Cashup / End of day
		- We accurately process end of day banking to make it easy for the bookkeeping and admin team on the other end.
		- We are able to efficiently problem solve when errors have happened during the day
	+ Entering & scanning
		- We enter patient forms and correspondence accurately into Cliniko
		- We scan forms and correspondence and upload to the patients Cliniko file
	+ Receiving and checking stock
		- We receive stock from suppliers, check it off against what has been ordered (forward order) and the invoice
		- We then put the stock away and let the team know that the stock has arrived
		- We check the whiteboard in the tea room to see if anything was specially ordered for a patient
	+ Processing instruments
		- We process instruments consistently through the day to make sure that there are sufficient supplies for our team
		- We batch the washing and packing of the instruments
		- We accurately complete the sterilization paperwork
	+ Priming
		- We understand patient priming (the one percenters) that contribute to an amazing experience for our patients
		- Therefore we complete the following through the week:
			* Watering plants
			* Keeping the diffuser full of water and smelling sharp!
			* Keeping magazines tidy and updated
			* Keeping flowers looking sharp
			* Cleaning bathrooms
			* Vacuuming/sweeping floors
			* Sweep away dirt, leaves or rubbish from the front of the clinic
			* Dusting shelves and horizontal surfaces
			* Cleaning windows
			* Wiping surfaces
	+ Letters to be sent out to arrive within 5 business days of seeing patient
* Updating Practitioner dashboard
	+ To be updated weekly usually monday mornings
		- New patient checklist
		- Missed and canceled appointments lists
		- patients without upcoming appointments / discharge list
* Wow experience jump shots for every patient
	+ Greeting and farewell with a smile on our face and in our voice within 3 seconds of the patient arriving
	+ Management of our patients as if they are our family! Be friendly
	+ Payment process is easy and seamless
* Communication
	+ Actively listens to the patient with empathy and care
	+ Communicates verbally with care, confidence and clarity
	+ Communicates physically with care confidence and clarity
	+ Uses clear communication skills to provide positive solutions for our patient
* Wow experiences for our patients:
	+ Creates absolute value for the patient with amazing technical, communication and soft skills
	+ Offers every patient a tea, coffee or water on arrival
	+ Selectively goes above and beyond for patients to create WOW experiences!
	+ Understands importance of the priming of the patient’s experience and enhances these areas where possible (sounds, smells, looks, feels of the environment/experience)

**Learning and development expectations**

* Is actively engaged in progressing the team and the experience we provide
* Is active in keeping up to date with learning material
* Attends regular quarterly personal development sessions
* Is active in attending external professional development courses / seminars / education

**Patient management KPI’s**

* Clinic rebooking rate is >80%
* Clinic cancellation rate is < 6% using scripts to reschedule patients who call to cancel
* Product sales (You know archies back to front and can easily fit and sell to patients)

**New Patient checklist KPI’s**

* New Patient details (name, email, phone, postcode, referral source) are in new patient checklist for every patient

**Podiatry specific KPI’s**

* Podiatry instruments are processed in a time efficient way to ensure instruments are always available
* Referral source entered into Cliniko for each patient for easy tracking

**Office Maintenance KPI’s (#priming!)**

* Plants are kept looking fresh and lively by regular maintenance (watering, spraying and cleaning (wiping leaves).
* Bathrooms are kept fresh, clean and shiny with regular attention to cleaning and product refilling
* Floors are kept clean, fresh and tidy with regular vacuuming
* Cardboard is broken down and taken out to the bin daily to reduce build up
* Rubbish is taken out daily to keep a clean and shiny work area

**Office administration**

* Paperwork (scanning, to be faxed, to be shredded) is completed and processed daily to maintain up to date information in Cliniko for best patient experiences and outcomes
* Scanning is completed daily to keep patient information up to date
* Shredding is done daily to keep up to date and reduce build up

**New Patient expectations**

* Professional relationships
	+ Is active in promoting our clinic to other professionals and people in your network
* Word of mouth
	+ Attracts >1 new patient per month via word of mouth (WOM)
	+ Actively promotes our clinic to your network
* Educational content
	+ Creates a social media graphic, photo, video per month to be used for social media (FB, Instagram, website)

**Team Expectations**

* Punctuality
	+ I am respectful of our patients, team members and the flow of my day by arriving at least 10 minutes before my scheduled start time
* Positivity
	+ I am positive, happy and abundant with communication with team, patients, referrers and suppliers
* Responsibility
	+ I live ‘above the line’ and take responsibility for personal and team actions whether individually at fault or otherwise
* Organisation
	+ I plan my quarter, month, week and day to optimise my effectiveness as part of the team
* Systems
	+ I contribute to team systems by creating, implementing or optimising 1 system per week
	+ I use systems to maintain the consistency of our WOW experience delivery
	+ I am active in providing constructive feedback and ideas regarding systems
* Action taker
	+ I am consistent in actioning and executing tasks to the overall benefit of me and my role as part of the Be Podiatry team

**Hours**

* This is a full time role that is between Greensborough and Ivanhoe clinic locations, the role encompasses a variety of responsibilities as part of the Be Podiatry team
* I am expected to make myself available for some outside of hours involvement as part of my role to help my growth and progression as well as that of the Be Podiatry Team
* I will be provided with personal and professional growth and learning opportunities
	+ Quarterly personal and professional development sessions

**Qualifications**

* Police check
* Working with Childrens Check
* First aid (not required but helpful)

We love that you are joining our team and we are looking forward to creating a challenging, fulfilling and progressive environment for you to come and create amazing health care experiences for people!

Yours in keeping people healthy, happy and comfortable,

Kate Heslop Olivia Leahy

*Podiatrist/Director*  *Clinical Coordinator*