

Position Description

Position Title	Client Services Officer
Position Number	P1195
Position Status	Fixed Term Part Time
Program Area	Client Services
Award/Agreement/Classification	Victorian Stand-Alone Community Health Services (Health and Allied Services, Managers and Administrative Officers) Multiple Enterprise Agreement 2011-2015, Clerical Worker, Grade C, Year 5
Reports To	Medical Practice Manager – Fitzroy & Innerspace
Contact	Tanya Karapouloutidis
Contact Phone Number	9448 5531

cohealth is one of Australia's largest community health organisations delivering a range of health and support services across Melbourne's CBD, northern and western suburbs.

cohealth's mission is to strengthen community and make a difference to the lives and wellbeing of people, particularly of those who experience stigma and the risk of marginalisation. We create impact through a powerful combination of advocacy, innovation in service delivery, and partnership with consumers, communities and other stakeholders.

With over 30 sites cohealth provides a range of vital local health and support services including medical, dental, allied health, mental health, and counselling, and many specialist health services. More information about cohealth is available on our website www.cohealth.org.au.

Staff enjoy being part of a supportive environment with strong leadership and a collegiate and communicative approach. A not for profit organisation built on strong values, cohealth's commitment to all staff and volunteers is to ensure a positive and supportive work environment.

cohealth is a child safe and equal opportunity employer that offers generous salary packaging and opportunity to undertake professional training and development opportunities. Aboriginal and Torres Strait Islander people, and those who speak languages other than English are encouraged to apply.

Owner Cheryle Abela	Approved by (Jane Canaway) Executive Sponsor Date: 21/06.2017
Scheduled review: June 20 2018	Document Number: 2

Site/Program Profile

The Client Services team at cohealth is the first point of contact, both face-to-face and via telephone for clients and visitors to the organisation. As an organisation that caters to a diverse population of clients, the Client Services team requires highly skilled individuals to ensure that those who access the service are welcomed, registered and supported throughout their journey in cohealth.

Position Summary

The Client Service Officer (CSO) is the first point of contact for most clients who access care at cohealth and as such must reflect cohealth values.

The CSO will be responsible for client reception, registration, arranging client appointments, data entry and other associated functions as directed by the Team Leader/Line Manager.

This is a generalist role responsible for the reception and waiting area and providing assistance to the full range of clerical and administrative functions for cohealth including the provision of high quality Oral Health, Medical and Allied Health services; high standards of customer service when responding, administration and teamwork are required .

The primary role of the CSO is to address all enquiries, whether in person or by telephone, and provide practical and administrative support to Oral Health, Medical and Allied Health staff of the service, including managing the flow of clients so as to optimise the number of consultations available.

Position Responsibilities

Customer Service

- Promptly respond to enquiries from clients and visitors whether face to face or by telephone in a professional and courteous manner. Respect language differences, cultural beliefs and practices;
- Receive and account for all clients who present to the Centre, ensuring that clients are eligible for the Programs and have completed the required documentation prior to their appointments;
- Liaise with other cohealth sites and public agencies to facilitate client care;
- Supervise the waiting area, including the monitoring of waiting times;
- Alert health care providers to the arrival/cancellation of clients' for appointments
- Administration of the needle exchange program;
- Defusing difficult situations and seeking assistance with critical incidents;
- Re-directing incoming calls (internally and externally);
- Providing information for referral to relevant services as required; and
- Administration of interpreter processes and requirements i.e. use of Telephone Interpreting Service (TIS) and onsite interpreting.

Owner Cheryle Abela	Approved by (Jane Canaway) Executive Sponsor Date: 21/06.2017
Scheduled review: June 20 2018	Document Number: 2

Appointment making and changing

- Participate in efficient oral and medical emergency triage processes;
- Ensuring appointment books are at capacity as directed by Team Leader/Manager;
- Proactively work with the team to optimise the use of clinician time;
- Confirming appointments and follow up of clients who do not attend;
- Generate and send recall letters;
- Follow up Medicare requirements for Allied Health referrals and assist with team care arrangements (i.e. completion of Medicare billing; referral requirements, use of relevant items);
- Provide relevant and up to date information to clients re: costs, use of Medicare items relating to MBS funded service and other options for service within cohealth;
- Provide referral information where required; and
- Place clients on waitlist, generating letters and respond to enquiries.

Client records management (electronic and paper based)

- Responsible for the management of the client record in accordance with cohealth Policies and Procedures;
- Client Registration using client software;
- Maintaining electronic files, scanning of relevant correspondence to support a 'paperless' system;
- Appropriate electronic filing of incoming pathology and radiology reports and any other correspondence relating to a particular client;
- Providing information to and from referring clinicians;
- Checking and updating client information (including Medicare information)
- Maintaining electronic files;
- Organising retrieval of archived files as required (i.e. on-site retrieval/ offsite retrieval); and
- Managing all requests for access to files, distribution of files to requesting GPs, courts and other necessary parties.

Finance: Income and Debtors

- Checking Medicare for correct item number and individual service provider selection prior to processing all accounts;
- Batching, reconciling and resubmissions;
- Monthly activity and financial reconciliations;
- Follow up of all outstanding accounts;
- Responsible for the checking and stamping of invoices in conjunction with the Team Leader/Line Manager.
- Responsible for the day to day management of Petty Cash ;
- Balancing takings and float daily; and
- Issue Taxi Vouchers where requested by appropriate staff;

Site and daily Waiting Room Management:

- Open and close premises at the start and end of each day;
- Manage reception, waiting areas including ensuring the waiting room and other client areas remain neat and hazard free;
- Undertake the general upkeep of the facility including stationery ordering and restocking;
- Assist in the organisation and maintenance of couriers, supplies, laboratory work and waste removal;
- Collect, sort and distribute mail and manage keys for site.

Owner Cheryle Abela	Approved by (Jane Canaway) Executive Sponsor Date: 21/06.2017
Scheduled review: June 20 2018	Document Number: 2

Teamwork & Communication

- Report on all areas of responsibility against performance targets;
- Participate in team meetings, regular supervision, plus an annual Individual Development Review process;
- Maintain and develop standards of practice and skills by pursuing internal and external professional development opportunities;
- Promote and represent the Centre as a caring, professional, and client-focused organisation;
- Participate in the identification of risks to the program and organisation;
- Maintain clear communication between receptionists, clinical staff and the Program Managers; and
- Assist the Program Managers with the induction of new or trainee staff members.

Duties for sites that include Medical Practices

The CSO rostered to sites that include Medical Practices work directly with the doctors and allied health practitioners to provide support. All CSOs support doctors (GPs) during consultation sessions where required, and may include (but is not limited to):

- Follow up on telephone enquiries as directed i.e. specialist reports
- Monitoring of waiting client health status and responding to any deterioration appropriately
- Responsible for the administration of Medicare and other insurance claims
- Organise courier service between cohealth sites and laboratory pick ups
- Room set up and re-stocking
- Assisting practice nurses with administrative tasks and with management of clients

Position Requirements (qualifications, skills, knowledge and attributes)

Qualifications, skills and attributes and the critical behaviours a person is required to fulfil the requirements of the job.

- **Qualifications** - technical qualifications in medical reception or an equivalent mixture of qualifications and work experience in medical/community health services.
- **Attributes** - Flexibility, initiative, professionalism, decisiveness, integrity, attention to detail, service orientation and respect.
- **Skills** – good communication and negotiation skills, writing skills, time management/organisational skills, analytical thinking, problem solving skills, computer skills.
- **Knowledge** – clear and demonstrated knowledge of community health and medical services, demonstrated knowledge of computer data systems such as TRAK, Titanium, Best Practice and/or Medical Director/Pracsoft. Demonstrated knowledge of accounts processes and appointment booking processes.

Owner Cheryle Abela	Approved by (Jane Canaway) Executive Sponsor Date: 21/06.2017
Scheduled review: June 20 2018	Document Number: 2

Key Selection criteria

Mandatory:

1. Experience with face to face customer service
2. Enjoys assisting clients such as people with disabilities and people from culturally and linguistically diverse backgrounds, throughout their journey with cohealth
3. Enjoys working within a dynamic, fast paced team environment
4. Basic understanding of accounting systems and procedures such as accounts payable and receivable, petty cash management, ordering equipment, invoicing and Medicare payment systems
5. Demonstrated experience and skills with standard computer software applications including Microsoft Outlook (medium-intermediate proficiency) Microsoft Word & Excel (basic-intermediate proficiency), and patient/ client management systems

Desirable:

1. Experienced medical receptionist or similar qualification or demonstrated experience within general practice/community health service (or similar) setting
2. Knowledge of Client Management Systems; Health Smart (TRAK), Titanium, Best Practice
3. Ability to speak relevant second language and understanding of cross-cultural issues
4. CPR training within the last 12 months or willingness to obtain
5. A willingness to work the occasional evening and/or weekend shift

Additional Information

1. cohealth is an equal opportunity employer.
2. Aboriginal and Torres Strait Islander people, and those who speak languages other than English are encouraged to apply.
3. This position is based at Collingwood & Fitzroy but may be required to work across sites from time to time or to change sites.
4. Employment is subject to the satisfactory completion of a Police Record check and where required a Working with Children Check.
5. In the context of occupational health and safety all employees are required to carry out their duties in a manner that does not adversely affect their own health and safety and that of others by reporting all incidents and injuries as well as co-operating with any measures introduced in the workplace to improve OH&S.
6. Salary packaging is available to all fixed and permanent staff.

Relationship to Performance Development and Review Plan

This position description operates in conjunction with and forms part of the relevant individual Performance Development Review Plan. An initial performance review will take place six months following commencement of employment and then on an annual basis.

Owner Cheryle Abela	Approved by (Jane Canaway) Executive Sponsor Date: 21/06.2017
Scheduled review: June 20 2018	Document Number: 2

Our Principles

Our work is informed by human rights based principles which include:

Participation: We work to improve access to our services by creating opportunities for active and meaningful participation.

Accountability: We have strong systems that are open and transparent and we actively encourage and respond to feedback.

Non-discrimination and attention to vulnerable groups: We work with the most disadvantaged people to improve their health and wellbeing.

Empowerment: We work alongside a strong and well-connected community that is supported to have a voice.

Linking practice to human rights standards: Our work promotes and protects the rights of staff, consumers and the wider community.

We require all employees to perform in a way that is in line with these principles.

Document Review Details

Version Number: 2

Date Reviewed: 20 June 2017

Date to be reviewed: 20 June 2018

I have read, understood and accept the above position description

Name

Signature

Date

**Senior
Manager
Name**

**Senior
Manager
Signature**

Date

Owner Cheryle Abela	Approved by (Jane Canaway) Executive Sponsor Date: 21/06.2017
Scheduled review: June 20 2018	Document Number: 2