

## JOB DESCRIPTION

1070

### 1. Job Details

Job title	Outpatient Booking Officer
Job grade	Band 3
Reports to	Out Patient Booking Manger
Division	Diagnostic and Outpatients
Location	Kings Mill Hospital

### 2. Job Purpose

- 2.1 The overriding purpose is to support the provision of the highest quality patient care through personal actions and continuous improvement.'
- 2.2 To maintain a high standard of quality in providing a clinic administration service, Supporting professionals and the Trust in achieving their goals, in particular ensuring maximum available clinic capacity and achievement of 18 week targets. This will also include the changing and cancelling of clinic appointments as appropriate and in accordance with the Trust Access Policy.

### 3. Role of the Department

- 3.1 In accordance with Trust policy to record the receipt of out patient referrals and to ensure the subsequent appropriate booking of out patient appointments.
- 3.2 To ensure that patients receive good quality and appropriate documentation and information related to their appointment.
- 3.3 To respond to clinic change requests which arrive via e-mail pro-forma, telephone call, face to face contact or analysis of the on call rota.

### 4. Organisation Chart

Please see attached chart

## **5 Key Result Areas**

- 5.1** To receive written referral letters and to pre-document the details of such onto the Patient Administration System (PAS), thus ensuring that patients' waiting times are correctly calculated and that patient enquiries regarding referrals can be dealt with in a timely manner.
- 5.2** Following pre-documentation referral letters will be made available to clinicians for grading. This will be done in a timely manner to ensure that referral letters are returned to the Clinic Administration office within 7 days of pre-documentation, thus supporting the Trust Access Policy, and the ability to meet waiting time targets.
- 5.3** During periods of annual leave/other absence, referral letters will be forwarded to the appropriate nominated consultant colleague, thus ensuring referral letters are still graded in the relevant timescales.
- 5.4** To chase any referral letters not returned within the above mentioned timescales to achieve the same outcomes as above.
- 5.5** To allocate appointments to patients requiring urgent appointments in line with agreed protocols and booking rules.
- 5.6** Following grading of referral's by consultant colleagues, to make out patient appointments ensuring patients will be seen by the appropriate team within agreed timescales. There will be a requirement to ensure patients who are referred on paper do not wait any longer than those booking via Choose and Book. There is also a requirement to escalate any potential 18 week breaches to the Line Manager.
- 5.7** Confirm in writing, details of the agreed appointment dates, providing other relevant information as required thus ensuring patients have all the information required for their OPD visit.
- 5.8** Provide a patient centered and timely response to all telephone enquiries from patients and all other agencies in the making of Outpatient appointments, thus providing patients with a high quality service. This will also be done, taking account of patients' rights and diversity and ensuring that all patients receive equal opportunity to receive our services.
- 5.9** Participate in the rota for the opening and sorting of mail thus ensuring that mail is sorted and distributed on a daily basis and correspondence dealt with in a timely fashion. All mail should be date stamped with the date of receipt, thus ensuring accurate data collection regarding patient referral dates.
- 5.10** To liaise with the appropriate medical staff/manager in relation to any required clinic over-bookings, to ensure patients are booked appropriately.
- 5.11** Ensure maximum use of available clinic capacity by trying to fill empty clinic slots on a daily basis therefore achieving the optimum 18 week position for the Trust and making the best use of resources available.

**5.12** To respond to requests for changes/cancellations to clinic appointments. This will include the following:

- To analyse the request and check that the information is complete against the clinic booking rules, and to obtain clarification from the requester where insufficient details are provided.
- Using experience and understanding of the individual clinic speciality and its needs when applying a clinic change. eg consider non routine aspects of clinics such as Nurse specialist links, Dietetic links etc, and whether these may also need to be cancelled.

### **Targets**

**5.13** Be aware of any Trust or national targets relating to the outpatient services and participate in any associated changes within the department associated with these.

**5.14** Ensure that all clinic change requests are in compliance with the Trust Access Policy and any failures are reported to the relevant business unit In order that changes outside policy are authorised before being carried out.

**5.15** All employees have an individual responsibility to have a knowledge of and employ the basic principles of infection control practice and to ensure adherence to the requirements in the Infection Control Manual.

**5.16** All staff employed by the Trust is required to work in a safe manner, in accordance with current health and safety legislation and with the general principles laid down in the Trust's Health and Safety Policy.

**5.17** You are required to comply with all of the Trust's policies and procedures. These are obtainable on the Trust's intranet site, where guidance is also contained.

**5.18** Equality and Diversity is fundamental to all the hospital does, both in the way we provide services to our community, patients and the way in which we manage our staff. All Trust employees are required to respect and adhere to the principles of equality and diversity treating patients and staff with dignity and respect as laid down in the Trust's Single Equality Scheme.

**5.19** All employees have an individual responsibility to ensure that all information recorded both manually and electronically achieves and maintains the highest possible data quality standards by adhering to the Trust's Data Quality Strategy and Policy. Poor quality information will put patient care and safety at risk, and will also impact the Trust's performance and finances.

**5.20** To undertake any other duties which may be reasonably regarded as within the nature of the duties, responsibilities and grade of the post as defined, subject to the proviso that appropriate training is given and that wherever possible significant changes of a permanent nature shall be mutually agreed and incorporated into the job description in specific terms and the post re-evaluated if the change is likely to result in a job evaluation score change.

## **6. Physical and Mental skills**

- 6.1** Constantly using analytical skills to interpret requests where the information now issued conflicts with another set of information. Eg Consultant is on call, clinic change request arrives stating consultant is on leave
- 6.2** Using initiative and tact to seek out correct information when conflicting or incorrect information has been issued.
- 6.3** Constant prioritisation of clinic change requests by monitoring the dates of the clinics to be changed
- 6.4** To be able to plan a series of clinic changes where there is no capacity for patients to be re-booked. This occurs in many clinics where the demand for the service is greater than the medical staff is able to provide so from one clinic change request a series of actions would be taken
- 6.5** Ensuring that any changes are communicated to patients and appropriate staff in a timely manner.
- 6.6** For each clinic request the Clinic Changes staffs identify the patients who are to be moved and the new clinic date they are to be moved to. The medical staff does not identify individual patients, the clinic changes team work to an agreed guideline for selection and any difficulties are relayed back to the consultant for further guidance.
- 6.7** Alert business units of any capacity issues and any issues arising from clinic changes
- 6.8** To have the ability to cope with a workload that arrives at any given point of the day which could be routine or immediate and therefore the working day cannot be planned in a detailed way.
- 6.9** To be informative and clear when working with different groups of staff when responding to clinic change requests
- 6.10** Excellent communicator in written presentation and verbal format to all levels of staff from receptionists, medical secretaries, nursing and medical staff.
- 6.11** Ability to maintain concentration despite many interruptions which may be telephone calls and medical and nursing staff coming into the office whilst working
- 6.12** To cope with the constant changes to the booking rules which causes added levels of Complexity when making changes to a clinic eg SpR changing teams for part of week

## **7. Responsibilities of the Post Holder**

- 7.1** Strict adherence to policies and procedures set out within the role

- 7.2** Attends all updates and ongoing training necessary to fulfil the role and be aware of current policies and procedures
- 7.3** To work as part of a team
- 7.4** To provide accountability and responsibility for self to ensure processes are followed and appropriate actions are taken
- 7.5** To provide high quality service of work undertaken by the team
- 7.6** Required to explain and demonstrate departmental procedures to less experienced colleagues
- 7.7** To implement changes to ensure clinics are changed accurately. Thereby ensuring that as the medical staff change firms or leave the Trust this is amended on the clinic guide information and the on call rota so when the on call rota is analysed the clinic changes team are looking for the current correct doctor's name.
- 7.8** Informing the Appointments Office and all key users with specific instructions resulting from medical staff absence. The team will use the e-mail system to impart information to a key group of users regarding a clinic change. An example could be the team have identified a doctor has changed his/her day on call and will no longer be in clinic. The clinic guide will be consulted and an e-mail will be sent to the Appointments staff to instruct any reduction to the number of new patients that could be seen, Reception kept informed so they know why if there are any patient calls why this has happened, the department leader so nursing staff can be released and any other support service to this clinic who may be affected.
- 7.9** To have dialogue with Consultants and non-medical staff in seeking answers and guidance appropriate to the clinic changes requested

## **8. Freedom to Act**

- 8.1** Will use initiative to seek information and analyse to secure accurate information from any member of staff e.g. medical secretary, nurse specialist, consultant
- 8.2** Will inform and instruct all levels of staff within Patient Admin and secretarial staff as necessary - these persons may be within their own sphere of work within our Trust, local PCT, or with Nottingham or Derby where our visiting consultants are based.
- 8.3** Will have high-level PAS access to set up ad hoc clinics. This level of PAS access is higher than reception staff and team leaders and is given mostly to managers- this is a restricted function, as the consequences of incorrect use would impact on patients adversely.
- 8.4** Ad-hoc clinic set up. Authorisation is given to this team to set these non-standard

clinics up. To set up one of these there has to be confirmation of nursing staff to cover, reception support, liaison for case notes and X-rays to be pulled and sent, any other support service and the patients notified. Any of this failing to be done would impact on the patient and service.

- 8.5** Will exercise judgement to communicate directly with staff in urgent clinic situations
- 8.6** Works with high level of independence and initiative. However Central Support Co-ordinator are available for support and advice as and when required

## **9. Physical, Mental and Emotional Effort Required**

- 9.1** Using persuasion and tact through difficult and challenging situations
- 9.2** Making fast accurate decisions when responding sensitively and speedily to urgent clinic change requests
- 9.3** Dealing with sensitive information on occasions when clinics have been changed/ cancelled due to medical staff issues. This information may be passed internally within the team or the wider Patient Administration team and secretarial staff.
- 9.4** On a daily basis to sit at a computer and taking numerous telephone calls from secretarial, reception, nursing and medical staff. This is for the majority of the shift
- 9.5** High level of mental alertness when handling written and verbal requests at all times
- 9.6** Constantly dealing with complex requests – there are currently 269 individual clinics that happen weekly on the King's Mill site. There is a guide or rule for each one, which is kept in a folder by consultant and specialty for ready reference for the team, however interpretation is needed to implement the change request by using knowledge and experience of the individual specialty involved.
- 9.7** Many of the clinics have defined patient pathways and link with Nurse specialist input and this has to be considered and be missing from the request information and needs to be analysed and handled sensitively.
- 9.8** Ability to problem solve
- 9.9** Hourly reviewing and re-prioritising workload due to unpredictability of incoming work
- 9.10** To cope with the constant changes of the medical staff impacting on the on call rota resulting in multiple rota's being issued consecutively in short timescales and all clinics re-checked each time as a consequence as a new rota is issued. This also means constantly re-covering work already undertaken.
- 9.11** Always working to deadlines i.e. the clinic date and ensuring patients are notified by letter or telephone call depending on time given re clinic change.

- 9.12** This post requires concentration for the whole of the shift to be maintained whilst frequent interruptions such as telephone calls, e-mails, and other staff physically coming into the office
- 9.13** Exposed to speaking to patients changing/cancelling appointments in an urgent situation that may be distressed and/or angry. This can happen a couple of times a week.
- 9.14** Rescheduling appointments and making decisions where no guidance given by leads Consultant.
- 9.15** Handling staff who may be distressed/stressed/angry for a variety of reasons who are verbally difficult and demanding because of some element of service provision
- 9.16** Ability to bend and lift reference files weighing 1 to 2kgs each from high shelves. These reference files are the 17 clinic guide books which are constantly in use - referred to on an hourly basis or shorter.

## **10 Outline of Working Conditions**

- 10.1** Working in an office with artificial and natural light
- 10.2** Working for long period up to 3 or 4 hours at a VDU

Title of Post Outpatient Booking Officer

NHS KSF DIMENSIONS	Needed for post?	Level for post				Notes
		1	2	3	4	
<b>CORE DIMENSIONS</b> -relates to all NHS posts						
1 Communication	Y		X			
2 Personal and people development	Y	X				
3 Health, safety and security	Y	X				
4 Service improvement	Y	X	X			All indicators level 1 following induction All indicators level 2 by second gateway
5 Quality	Y	X	X			All indicators level 2 by first gateway
6 Equality and diversity	Y	X				
<b>SPECIFIC DIMENSIONS</b>						
<b>HEALTH AND WELLBEING</b>						
HWB1 Promotion of health and wellbeing and prevention of adverse effects to health and wellbeing						
HWB2 Assessment and care planning to meet people's health and wellbeing needs						
HWB3 Protection of health and wellbeing						
HWB4 Enablement to address health and wellbeing needs						
HWB5 Provision of care to meet health and wellbeing needs						
HWB6 Assessment and treatment planning						
HWB7 Interventions and treatments						
HWB8 Biomedical investigation and intervention						
HWB9 Equipment and devices to meet health and wellbeing needs						
HWB10 Products to meet health and wellbeing needs						

NHS KSF DIMENSIONS	Needed for post?	Level for post				Notes
		1	2	3	4	
ESTATES AND FACILITIES						
EF1 Systems, vehicles and equipment						
EF2 Environments and buildings						
EF3 Transport and logistics						
<b>INFORMATION AND KNOWLEDGE</b>						
IK1 Information processing	Y		X			All indicators level 2 by first gateway
IK2 Information collection and analysis	Y	X				All indicators level 1 by first gateway
IK3 Knowledge and information resources						
GENERAL						
G1 Learning and development						
G2 Development and innovation						
G3 Procurement and commissioning						
G4 Financial Management						
G5 Services and project management						
G6 People management						
G7 Capacity and capability						
G8 Public relations and marketing						

**Job Description Agreement**

Job Holder's Signature ..... Date .....

Line Manager's Signature ..... Date .....

## Sherwood Forest Hospitals NHS Trust Person Specification

### Post of Outpatient Booking Officer

Attribute	Essential	Weighting	Desirable	Weighting	How Identified
Knowledge Requirements	Knowledge of Microsoft Outlook and packages Communication with different stakeholders at various levels Evidence of team worker Ability to work under pressure Ability to prioritise Show time management skills Willingness to learn and adapt to changes		Knowledge of 18 weeks pathway Knowledge of Medway and NHS in general  ECDL  NVQ Level 2 Admin  Admin experience		Application Interview
Qualifications-Academic	Good standard of education		Evidence of personal development		Application Interview
Experience	Of outpatient services and outpatient booking processes  Extensive knowledge of Medway		Customer care experience		Application Interview
Contractual Requirements	Ability to be flexible with working hours Adherence to Trust and departmental Policies and procedures Ability to work in a confidential settings				

**Patient Services Department Structure**

