

(Clinic Name)

EMPLOYEE HANDBOOK

Date Published

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1. Clinic Information

1.1 Vision and Mission Statements

GUIDE: The vision and mission statements should be created by the management of the clinic. The mission statement should communicate the organization's objectives and primary function. The vision statement defines both the purpose and the values of the organization.

The mission of (Clinic Name) is ...

The vision of (Clinic Name) is ...

1.2 Hours of Operation

GUIDE: While this should be clearly identified within the employee's letter of employment offer, the handbook should also provide the employer an opportunity to restate the clinic's operating hours as well as if there are any identified break periods (e.g. lunch). This clarification would be specific to the actual times of clinic operation, days of clinic operation as well as the employers defined work week in terms of actual hours- e.g.: 37.5, 40.0, 35.0 etc. Be sure to include any extended hours of operation.

The (Clinic Name) is open for patient visits (day to day) from (hour-hour) as well as on (day) nights from (hour-hour). The switchboard is open (day to day) from (hour to hour) to book appointments.

1.3 Organizational Chart

GUIDE: An organizational chart is a diagram that shows your employees the structure of the organization as well as the relationships and relative ranks of the positions within the organization. A sample organizational chart is in Section 9 (Forms).

1.4 Team Meetings

GUIDE: Team meetings are vital for management and communications within an organization. Inform employees how often these meetings would occur- e.g.: biweekly, monthly etc. Also include who is responsible for organizing the meetings and if attendance at the meetings is mandatory or optional. Specify if attending meetings on days that normally would not be a work day for P/T staff is mandatory/optional/paid?

(Clinic Name) holds team meetings every (two weeks, month, etc.) on (day) and the (position) is responsible for organizing these meetings. Employees must/can attend (every, 6/10, etc.) every meeting. If an employee cannot attend, they must notify (name) prior to the meeting.

See a sample team meeting agenda in section 9.

1.5 Code of Conduct

GUIDE: Code of Conduct is an important document for an organization that provides general guidance on the standards of conduct adopted by everyone who works/volunteers at the clinic. It

addresses many of the main areas of ethical behavior but is not designed to be comprehensive in nature.

Staff are required to conduct themselves at all times ethically and with integrity, honesty and diligence in performing their work or work related duties.

In situations of uncertainty or confusion regarding this Code of Conduct or its application, staff are encouraged to speak with their supervisor or another appropriate individual at the Clinic. When in doubt, ask yourself: "If there were full public disclosure of the facts, would it embarrass me, the Clinic, our patients, my fellow employees or members of my family?"

Compliance with the Law

Staff shall comply with all applicable provisions of laws and regulations. No staff shall commit or condone an illegal act or instruct another individual to do so. Staff must not engage in or give the appearance of being engaged in any improper conduct that is in violation of this code.

Conflict of Interest

Staff shall avoid any situation in which there is a real or potential for conflict of interest that could interfere or be perceived to interfere with the staff's judgment in pursuing the best interests of the Clinic. Staff shall disclose to their immediate supervisor all circumstances that constitute a real or perceived conflict of interest and remove themselves from the situation.

External Employment/Contracts

Staff may hold external jobs or engagements as the case may be using their own time and resources and in a manner that does not adversely impact upon their performance or responsibilities at the Clinic.

Gifts and Entertainment

It is the Clinic policy that staff shall not accept entertainment, gifts or other benefits that are intended to influence or can reasonably be perceived or inferred by other to influence the judgment of the staff member in pursuing the best interests of the Clinic.

As a general guideline, staff may only receive entertainment, gifts or other benefits when it is immaterial and valued at less than \$100 and only when it is lawful and ethical, occasional and infrequent, customary and consistent with accepted business norms and practices and is in support of the business of the Clinic and not principally for the staff member's use or well being.

If staff members has any doubt about whether it is appropriate to accept entertainment, gifts or other benefits, the staff member is required to promptly notify and discuss the situation with their Supervisor.

Use of Personal Electronic Devices while at Work

The Clinic staff will turn their personal electronic devices on 'vibrate or silent' while at work. Exceptions are only in special circumstances of personal family emergency.

Reporting Process

Staff who become aware of the behavior of another person that may damage the Clinic's standing or reputation because it may be unethical, harmful, illegal or inconsistent with the standards of conduct expressed in this policy shall immediately notify their supervisor or a Clinical Director.

Breaches of the Code of Conduct and Ethics Policy

Staff found to have been involved in a wrong doing covered under this policy may, in addition to any civil or criminal proceedings, be subject to appropriate disciplinary procedures, including dismissal.

The Clinic will not permit retaliation of any kind against staff for a complaint submitted in good faith under this policy, regardless of the outcome of the investigation. However, staff who do not act in good faith or make an allegation maliciously or without having reasonable grounds may be subject to disciplinary action, including dismissal.

1.6 New Staff Orientation

GUIDE: Inform employees if new staff orientation exists, what it looks like, who is responsible for delivering the orientation, how long it lasts.

(Clinic Name) has a new staff orientation program for all new staff hired that will allow the new staff member to familiarize themselves with office policies and procedures, know where everything is and how to use all of the equipment including computer and phone systems, fax machine etc.

Each new staff member will be assigned to meet with their Supervisor who will give them an overview of the clinic and meet all of the staff members.

1.7 Security

GUIDE: Inform employees about what kind of security the building has. - e.g.: security guards after hours, who has keys to lock the doors, who is responsible for opening and closing the clinic, if it has an alarm system, etc.

(Clinic Name) has an alarm system that needs to be set every night. (Name) is responsible for opening and closing the clinic... If you see someone who is destroying property or is unauthorized to be in the building, please report to security.

1.8 Dress Code

GUIDE: Specify the dress code for employees. Specify if employees have to wear a special uniform such as scrubs. Are there casual days?

All employees are required to dress neatly and conservatively while maintaining good personal hygiene. Appropriate attire is 'medical clinic uniform' or appropriate office attire. (Day) is a casual day so jeans are appropriate but all clothing still needs to be appropriate office attire.

1.9 Scent Rules

GUIDE: Specify if the clinic has any policies on wearing scent for its employees.

Strong colognes, perfumes, deodorants, and body sprays are not to be worn in the clinic as these may cause allergic reactions in some patients.

1.10 Parking

GUIDE: Inform employees where they can park, the hours they can park there, and if there is any cost to them.

(Clinic Name) has (designated/or not) parking available to employees (in front, behind, under) the building...

1.11 Building Facilities

GUIDE: Inform employees what facilities are available to them and where they are located. e.g.: laundry, kitchen, bathroom, showers etc. Also include who is responsible for the cleanup of these locations.

(Clinic Name) has a kitchen available to staff members located (location). Each employee is responsible for cleaning up after themselves.

1.12 Fire Drill Procedures*

GUIDE: Inform employees what the fire drill procedures for the clinic are and where they can find a diagram of the fire escape route, the fire extinguisher, fire blanket etc. Mention who the Fire Captain for the clinic is. Check with your local fire department and city department what the regulations are in your area for fire drills (varies according to business type and municipality).

(Clinic Name) has developed fire drill procedures to be used in case of fire and are located in the office (blank) binder? Fire escape routes and procedures diagrams are located by all of the exits. Please familiarize yourself with the clinic's escape routes. The fire extinguisher is located (blank)...etc. The building facility manager/clinic manager may hold annual/semi-annual/monthly practice fire drills. The Fire Captain for the Clinic is (blank).

2. Time Away from Work

*GUIDE: There are different types of absences from work that will occur and the employer must specify with a clear policy to address each of them and define the employer's position on whether or not the employee will be paid full, partial or no pay for the absence. Some work absences (jury duty, vacation, statutory holidays, maternity/paternal leave) must meet or exceed the minimum described within the Alberta Employment Standards (identified with an *).*

If you are planning to be away from work please fill out the Time Off Request for planned absences (form in Section 9) and submit to your Supervisor for approval.

2.1 Bereavement/Compassionate Leave

GUIDE: In the instances where an employee requires time off for compassionate or extended leave, the employer must define if they will allow it, and then if they will have a provision for full/partial compensation or no compensation at all. Additional consideration should be given to defining if there is varying days available depending on the relationship of the deceased to the employee and distance of travel.

(Clinic) offers bereavement leave to employees. You are entitled up to three days paid leave if a death occurs in the immediate family (spouse, partner, child, parent, sibling, child and parent of spouse/partner, grandparents, and grandchildren). If you travel out of province for the funeral two additional days are provided if you need. You can also take one day of paid leave for the death of an extended family member or a close friend. Requests for bereavement leave will be considered on an individual basis and must be submitted to the Supervisor.

2.2 Jury Duty*

GUIDE: Jury duty is not a voluntary absence for the employee, and the employer must decide if they wish to compensate the individual for their time away and how many days are allowable. Additionally, the employer must determine if the employee will be paid any sort of reimbursement from the courts, and adjust their policy accordingly to accommodate for this payment.

If you are required by law to appear in court for jury duty, (Clinic) will compensate you while you are on jury duty. Any other payments you receive for the jury duty will be paid back to the Clinic.

2.3 Maternity/Paternal Leave*

GUIDE: Employees are entitled to maternity/paternal Leave as defined by the Alberta Employment Standards

Alberta employees are entitled to up to one year of unpaid, job-protected leave in the event of the birth and up to 37 weeks on the adoption of a child. Birth mothers can take up to 52 consecutive weeks of unpaid job protected leave. This is made up of 15 weeks maternity leave and 37 weeks parental leave.

Fathers and/or adoptive parents are eligible for up to 37 consecutive weeks of unpaid, job protected parental leave. Adoptive parents can take parental leave regardless of the age of the adopted child. Parental leave may be taken by one parent or shared between two parents but the total combined leave cannot exceed 37 weeks.

As per the Alberta Employment Standards Code, employees must have 52 consecutive weeks of employment with their employer to be eligible for maternity and/or parental leave. This requirement applies to both full time and part time employees. However, under human rights law, employers are required to accommodate the health related consequences of an employee's pregnancy and childbirth up to the point of undue hardship, regardless of how long she has worked for the employer. This means that even if a pregnant employee has worked for the employer for less than 52 consecutive weeks and is

therefore not entitled to maternity leave under the Code, she still has the rights to a leave from her employment for the health-related consequences of pregnancy and childbirth.

2.4 Sick Leave

GUIDE: Employee absence due to illness will happen, and your defined policy must address if the employer will compensate the employee for absence due to illness.

If you work full-time, you are eligible for sick leave after the probation period. You must call in to your Supervisor to let them know that you are ill and not coming in. In order that arrangements, if necessary, can be made to cover your absence, notification must be made by 8:00a.m on the first day of absence.

Length of Service	Full Salary
Less than 3 months	0
3 months to 2 years	5 days
More than 2 years	7 days

The sick days may be paid as individual days or combined. The same length of service criteria applies to part-time employees (or maybe prorated), although you must work at least 600 hours before being eligible for sick leave.

2.5 Personal Time Off

GUIDE: In the event where the employer chooses to not develop specific policies on situations previously listed (aside from maternity/parental), they may simply want to define a number of personal days available to the employee to cover all potential absences including medical/dental appointments. In this case, the employer must define how many days available, if they are paid or not, how the absences will be applied for, who approves and records them, and what happens once the days are exhausted.

(Clinic Name) offers (blank) number of personal days for (full-time/part-time) employee. Personal days include personal appointments. These days (will/will not) be paid. Please inform (name) of these days as (he/she) will be the one recording them. Once employees have exhausted their personal days time off any additional personal time off will be without pay.

2.6 Statutory Holidays*

GUIDE: Alberta has designated nine specific days as statutory holidays and an additional three as optional. Be sure to specify which optional holidays your clinic is observing, if any.

Alberta has designated 9 specific days as statutory holiday days and an additional 3 as optional. All are listed in the chart below. Remuneration for working a statutory holiday is at 2.5 times your regular hourly wage, or is compensated at 1.5 times your regular hourly wage plus one day off.

Specific Day	Day	Statutory or Optional
New Years Day	January 1	Statutory
Family Day	3 rd Monday in February	Statutory
Good Friday	Friday before Easter	Statutory
Victoria Day	Monday before May 25	Statutory
Canada Day	July 1	Statutory
Labour Day	First Monday in September	Statutory
Thanksgiving Day	Second Monday in October	Statutory
Remembrance Day	November 11	Statutory
Christmas Day	December 25	Statutory
Easter Monday	Monday following Easter	Optional
Heritage Day	First Monday in August	Optional
Boxing Day	December 26	Optional

When a paid holiday falls on a Saturday or Sunday, a day off will be substituted in lieu thereof.

2.7 Vacation*

Under Alberta Employment Standards, employees are entitled to paid vacation leave based on the time employed with the employer. The current statutory entitlement states that employees are entitled to:

- 2 weeks after each of the first 4 years of employment, and
- 3 weeks after 5 consecutive years of employment and each year of employment after that

However, while there is a defined statutory entitlement, most employers have a customized approach to vacation entitlement which reflects their strategy to reward and retain employees. A vacation entitlement which exceeds that of the statutory requirement could resemble the chart below.

Regardless of the vacation policy you choose to implement, it must meet or exceed the minimum described within Alberta Employment Standards.

Things to consider when defining your vacation policy:

- Your employee is entitled to receive vacation entitlement and as their employer, you need to define if they are to receive this either by 1) taking time off with pay or 2) receiving their vacation pay (%) on every pay check. They are not entitled to receive both.
- How are employees allowed to take their vacation? Can they take single days? Is there a maximum at (i.e. 2 weeks) they can take at one time? Is there a form?
- How many employees are allowed off at one time and who provides the coverage in their absence?

- If the clinic/practice closes for certain times annually, is this automatically considered vacation time for the employee?

The establishment of a clear and concise vacation policy should provide clear direction for both management and employees, so that there is no room for discussion on what is allowed and how it can be taken.

After Completion of	Vacation Entitlement
1 year of employment	2 weeks
2 through 5 years of employment	3 weeks
6 years	4 weeks
10 years	5 weeks
15 years	6 weeks

2.8 Overtime and Time in Lieu*

GUIDE: According to Alberta Employment Standards an employer must pay an employee overtime pay for overtime hours unless the employer or employee have entered into an overtime agreement.

As an employee of the (clinic name), you are entitled to payment or time in lieu for overtime worked.

All overtime hours must be approved by your supervisor prior to the overtime worked. This overtime should be noted on your timesheet, and may be reimbursed by pay or by time in lieu.

Basic Rule

According to Alberta Employment Standards overtime hours in respect of a work week are the greater of:

- The total of an employee's hours of work in excess of 8 hours on each work day in the work week, OR
- An employee's hours of work in excess of 44 hours in the work week

If the greater of the 8 or 44 hours are the same, then overtime hours are those common hours.

Overtime hours must be paid at not less than 1.5 times the employee's wage rate.

The only exception to paying overtime at the rate of 1.5 times is where the overtime is accumulated under an agreement between the employer and the employee. In such cases, the agreement will provide for time off work with pay (or time in lieu) to be taken instead of overtime pay.

The Alberta Labor Code requires employers to keep up to date records of overtime hours banked; the number of hours taken off with pay by employee; and providing the employee with a pay statement showing the number of banked overtime hours.

Under Section 20 of the Employment Standards Code, providing certain conditions are met, an employer may require or permit an employee to work a Compressed Work Week, which is an arrangement that consists of fewer work days in the work week and more hours of work in a work day, paid at the employee's regular wage rate.

To be valid, a compressed work week (CWW) must be scheduled in advance and the schedule must meet the following requirements:

- a) If the compressed work week is part of a cycle, the schedule must show all the work weeks that make up the cycle;
- b) The maximum hours of work that an employee may be scheduled to work in a work day is 12 hours;
- c) The maximum hours of work that an employee may be scheduled to work in a compressed work week is 44 hours;
- d) If the CWW is part of a cycle, clause (c) above (which requires that the maximum hours of work that an employee may be scheduled to work in a CWW is 44 hours) does not apply and the maximum average weekly hours of work that an employee may be scheduled to work in the work weeks that are part of the cycle is 44 hours.

Overtime is still possible with a CWW arrangement, but it may not be scheduled as part of the CWW. Overtime is calculated both on a daily and a weekly (or cycle) basis. The greater number of overtime hours is what must be paid. Alternatively, overtime worked under the CWW arrangement could be given as time off through an overtime agreement.

2.9 Medical and Dental Coverage

GUIDE: Specify if you have any medical and/or dental coverage for your employees. If your benefits provider does not provide a plan overview booklet, it is important to document to employees the details of the plan as well as what is the expected employee and employer contribution for the benefits. Additionally, it is also important to identify when an employee is eligible (e.g. part time, full time, etc), when they cease to be eligible and if participation in the plan is mandatory.

(Full time/part time) employees are eligible for medical and dental benefits after (blank) amount of time working at our clinic. Participation in this plan (is/is not) mandatory. Etc.

2.10 Short Term and Long Term Disability

GUIDE: Outline how long your employees can take for short term or long term disability leave, how much they will get paid, and what happens once these days are exhausted. Be sure to specify part time versus full time employees.

Full time/part time employees can take (blank) amount of days for disability leave and will be paid (blank). Once these days are exhausted...

2.11 Life Insurance

GUIDE: Inform your employees if you offer life insurance, if it will cost them anything, and who is eligible for it.

(Clinic Name) (does/does not) offer life insurance. Full time/part time employees (are/are not) eligible. Etc.

2.12 Employee and Family Assistance Program

GUIDE: Inform employees of the Employee and Family Assistance Program services offered to them. Be sure to include if it will cost them anything and who is eligible.

(Clinic Name) offers employees (blank) assistance programs that are available to employees and their families. (Part time/full time/both) are eligible, etc...

2.13 Workers Compensation Benefits

GUIDE: Specify if employees are covered under WCB and what forms they have to fill out in case of a claim.

(Clinic Name) (does/does not) offer WCB to our employees. The forms employees have to fill out, in case of a WCB claim, will be in section (blank) of the handbook.

2.14 Pension, RRSP

GUIDE: Explain the details of the pension and RRSP program your clinic offers. Include who is eligible, how much they need to contribute each month, etc.

(Full/part time) employees are eligible for these programs as long as they contribute (blank) amount each month. Etc.

2.15 Training and Education

GUIDE: Inform employees if you have compensation for training and education programs. Include what programs they can claim, how much they will be compensated, and who approves the compensation for these programs.

(Clinic Name) (does/does not) offer compensation for training and education programs. You must always obtain prior approval from your supervisor to qualify for course reimbursement. If they are (blank) programs, employees will be compensated (blank) amount and (name) will approve this.

3. HR Administration

3.1 Timesheet Policies and Forms

Timesheets serve as the legal authority to record the hours worked and paid to an employee. Timesheets will be submitted to, reviewed and approved by an (name/position). See Section 9 for Sample Time Sheet. Each employee will receive a Schedule of payroll submission deadlines and pay periods on an annual basis.

3.2 Pay Periods

Payments will be made by direct deposit to your specified bank account or issue a cheque. If a payday falls on a weekend or a statutory holiday, the payday is moved to the preceding weekday. The (clinic name) pays all employees on a (bi-monthly/monthly) basis.

If you are a casual employee, your pay cheque is processed on the (date) and (date) of the month. If there are any discrepancies on your pay cheque, please see your supervisor/HR/payroll.

3.3 Pay Guidelines/Grid

GUIDE: Outline the details of your clinics pay guidelines or pay grid. One example is shown below.

The (Clinic Name) pay grid program is based on the following design principles:

Internal Equity: (Clinic Name) recognizes the importance of the relative value (worth of jobs) and job requirements in establishing its wage model.

Market Competitiveness: (Clinic Name) will ensure annual base wage rates are competitive with relevant market rates through the ongoing participation and/or review of wage surveys, and/or commissioned surveys, etc.

Flexibility: (Clinic Name) supports the concept of flexibility in the administration of the pay grid to allow the clinic to recognize unique job requirements when required.

Alignment with Compensation Principles: (Clinic Name) has developed its pay grid to follow Generally Accepted Compensation Principles (i.e. administrative simplicity, competitiveness with market practices of other relevant organizations, etc).

The specific objectives of the pay grids are to provide fair and equitable wages for all employees and to attract and retain the services of talented and qualified employees.

(Clinic Name) has instituted a pay grid based on the market average rate. Accordingly, (Clinic Name) is maintaining a competitive position in the marketplace.

Example of Pay Administration:

Step 1- Minimum: This is a developmental entry level; rate paid to those who are new to the job, with no/minimal prior experience specific to that job. The incumbent typically requires training or skill development to fully perform duties of the job.

Step 2- Midpoint: The arithmetic midpoint; rate paid to those with some related prior experience, either at clinic or elsewhere. The incumbent typically has the skills and abilities to perform the requirements of the job, but may still be acquiring skills and/or experience related to the job.

Step 3- Maximum: Rate paid to those with significant prior experience, either at this clinic or elsewhere. The incumbent typically has all the skills and abilities to perform the job. A newly hired employee could still be paid at this level if they have the skills, abilities and experience to fully perform the job at the highest level of job requirements.

Casual employees will be placed at the minimum rate of the wage band corresponding to the band placement for its full time regular counterpart.

Prior to or near the beginning of each fiscal year, all individual wage rates will be reviewed. Progression within a pay band will be based on a combination of several factors including current job responsibilities, market rates, qualifications related to the job duties including experience prior to and with the clinic and current wages.

The pay grid will be reviewed annually to ensure competitiveness with external market pay practices; and may be increased in consideration of general economic indicators (e.g. cost of living, market trends, etc)

A wage that is beyond the maximum rate in the band, must be approved by (name).

(Clinic Name) pay grid administrative guidelines will be approved by (name); including any material changes, additions, or deletions to the program in the future.

An employee may request that the classification for his/her position be reviewed for further consideration. This request should be supported by clear rationale, signed off by an immediate supervisor and submitted to (name).

3.4 Hiring Guidelines

(Clinic name) complies with Alberta Employment Standards and we apply a fair and consistent approach to hiring. Our goal is to hire quality staff who support the achievement of clinic strategies and goals.

As an employee, your position will fall into one of the following categories:

Permanent Full Time/Part Time

- Full time employees work (blank) days a week for a total of (blank) hours. Part time positions work less than (blank) hours a week.
- Full time positions are posted for a minimum of (blank) working days internally/externally

Casual

- An employee who does not work continuously but instead has gaps in his or her work and earnings is considered a casual employee

Generally, employment of immediate family will/will not be considered. These cases will be discussed on a case-by-case basis.

All new employees will be required to sign an employment contract before the first day of employment.

4. Performance Appraisal System

4.1 Position Profiles

GUIDE: A template to create position profiles is in Section 9.

Position profiles for the (clinic) are located in the back of the handbook in Section 9. The position profiles include the following positions: MOA, Receptionist, Billing Clerk, Referral Coordinator, Clinical Assistant I and II, Medical Secretary, Business Manager/Office Manager, Dietician, Mental Health Navigator, Pharmacist, Social Worker, Medical Transcriptionist. Competency Dictionary is outlined in Appendix 3.

4.2 Probationary Period

The probationary period is intended to provide time to train and orientate new employees. This probationary period is three months long and is a time for the clinic to ensure that new employees are a good fit to the position, as well as for new employees to determine if the (clinic name) is the right place for them.

During this time, new employees can resign without a reason, and with or without notice. Likewise, during the probation period, the (clinic name) can terminate your employment without giving you any reason, with or without notice. Following a successful probation period, you will become a permanent employee.

4.3 Performance Management

The (clinic name) has developed a performance management system to track and evaluate employee performance. This process supports personal development, performance feedback, and goal setting.

Throughout the performance management process, you will:

- Get targeted feedback on performance from supervisor(s)
- Achieve clear expectations of performance and strategies to enhance personal performance

(Name) will be in charge of the performance review process.

A copy of performance evaluation form can be found in Section 9.

4.4 Conflict Resolution Process

The conflict resolution process at the (Clinic Name) is as follows:

1. Talk to the individual with whom you have a conflict, if not resolved go to step 2
2. Talk to your supervisor, if not resolved go to step 3
3. Talk to the clinic director(s), if not resolved go to step 4
4. The clinic director will assign a Physician Staff Liaison (PSL) who will work directly with the person(s) involved and seek a resolution that will be binding

4.5 Resignation, Termination or Retirement

If you are leaving the (clinic name) due to resignation, termination, or retirement, steps must be taken prior to you leaving. These steps ensure continuity for the organization upon your departure and help make your transition out of the clinic as smooth as possible.

Written notice is required if you are leaving permanently. Refer to your employment contract. While we appreciate as much notice as possible, we require two weeks if you have been employed for less than two years, and at least three weeks if you have been employed for longer than two years. Your notice should be submitted to (name).

Any outstanding banked time, vacation balance and vacation accrual will be paid out on your final cheque. Please remember to return all clinic property when you leave.

Employees (regular full or part time) who have worked three months or more but less than one year are entitled to written notice or pay in lieu of notice of at least one week.

Employees (regular full or part time) who have worked at least one year are entitled to written notice or pay in lieu of notice of at least two weeks.

Employees (regular full or part time) who have worked three years or more are entitled to written notice or pay in lieu of notice of at least one week for each year of employment to a maximum of eight weeks.

5. Confidentiality of Information

GUIDE: The collection, use, disclosure and retention of health information by the (clinic name) are governed by the provisions of the Health Information Act (HIA). Each clinic must be compliant under the HIA.

5.1 Privacy Charter

(Clinic name) is committed to ensuring that our patients' privacy and confidentiality of information is protected as effectively as possible. Information held by the clinic, including information about its' employees is collected, stored, used, and disclosed in accordance with the privacy principles governed by the provisions of the Health Information Act (HIA).

We are committed to keeping personal information held on all members/patients private. We regularly review, and if necessary, update our security measures to ensure that all information is held secure and that appropriate security measures and technology are maintained.

The relationship between a physician and his/her patient is a very personal one and is strictly confidential, both ethically and legally. Accordingly, you shall not, either during or after your employment with the clinic, disclose any information concerning the business and affairs of the clinic or its patients except in strict accordance with the Health Information Act on the release of confidential information.

All employees, physicians, contractors, students and volunteers providing services on behalf of (clinic name) must sign the Confidentiality Oath form (Section 9). Refusal to sign the confidentiality oath form or failure to comply with the documented oath on confidentiality form will result in prompt dismissal.

5.2 Privacy and Security*

Please print and review the complete Privacy and Security Manual (appendix 1) for all your staff to read and be aware of and act according to the HIA policies and guidelines.

5.3 Privacy Officer

(Name) is in charge of the privacy program at (Clinic Name). Their duties are outlined in the Privacy and Security Manual (appendix 1).

6. Use of Computers, Information, and Equipment

(Clinic Name) will provide you with various business tools, such as computers and telecommunication systems, to assist in meeting your position responsibilities. These include but are not limited to: telephones, fax machines, computers, email, and internet access.

Communicating Information

- You are expected to use care and good judgment in the type, tone, and content of email message.
- All forms of electronic communications should comply with the accepted standards of business conversation and withstand public scrutiny.

(Clinic name) Rights to Monitor and Access Information

- (Clinic name) has the right, but not necessarily the duty, to monitor any and all aspects of its computer system including, but not limited to, any websites that you are visiting.
- Emails sent from our server reside on the clinic system and belong to the (clinic name). As such, your emails may be accessed by authorized staff for business purposes or to investigate a complaint or alleged violation of policy. Emails and other forms of electronic communication are not considered confidential.

Prohibited Uses

- You may not use the clinic server for commercial advertisements, chain letters, solicitations, promotions, destructive programs (e.g. viruses or self replicating programs) or any other unauthorized use.

Security

- Passwords are there for the security of information and should never be shared. The clinic antivirus software is enabled at all times.

Failure to abide by these policies may result in disciplinary action up to and including termination.

Personal phone calls and correspondence should be kept to a minimum and be out of earshot of patients. Similarly, personal conversations among staff members should be discreet and out of earshot of the patients in the clinic.

6.1 Medical Records Policy

The College of Physicians and Surgeons in Alberta (CPSA) requires that physicians should retain office medical records for 10 years following the date of last service or, in the case of minor patients, until 20 years of age, whichever is longer. Patients are not entitled to remove records from the physician's office. Records belong to the attending physician.

Patients cannot alter a physician's office chart, but can request entry of an amendment with physician approval.

When seeking information from another physician, the requesting physician should provide a signed release by the patient.

Sending physicians can charge a patient for transferring a copy of their record. Charges can include costs of shipping, other than by mail or fax. **Remember:** the fee charged must be reasonable in relation to the service provided, and the ability of the patient to pay. Physicians must be prepared to discuss fees with patients. Provision of information cannot be withheld pending prior payment.

Clinic records, both on-site and off-site, are held and stored in an organized, safe and secure manner.

Paper-copy patient charts are labeled using a code, instead of a patient name.

Records storage areas must be secured, have restricted access and are equipped with smoke detectors, fire extinguishers and sprinkler systems when possible.

Patient information is not left unattended in areas to which the public has access.

The electronic health information system's network server is located in a locked room. When health information is transported to another location, it is placed in a sealed envelope, marked as confidential, and directed to the attention of the authorized recipient.

Patient charts that are left outside physician examining rooms are turned so that the patient's name is not visible. Patient charts are not to be removed from the building premises.

7. Workplace Health and Safety

7.1 Health and Safety Policies

(Clinic Name) is committed to providing a workplace that is healthy, positive, comfortable and safe for its employees and patients. Please follow the clinic's policy about disposal of sharp objects, needles, medical waste etc. Staff have a responsibility to act safely and to avoid creating situations that may endanger themselves or others. This policy includes everything from your desk, office space to ensuring your safety and security.

7.2 Clinic Incidents

All staff members are responsible for their own personal safety and the safety of those around them. Common sense should always be applied in situations that can be considered dangerous.

If there is an incident in the clinic, please fill out the clinic incident report within 12 hours of the incident. The forms can be found in Section 9 and should be returned to (name).

7.3 Drug and Alcohol Policy

Any employee who is found to be under the influence of illegal drugs/substances or alcohol while on duty will be sent home immediately and will be subject to disciplinary measure. Any employee whose work performance, attendance or conduct is found to be unsatisfactory because of illegal drugs/substances or alcohol, will be offered the opportunity for rehabilitation. Refusal of treatment may result in immediate termination.

7.4 Workplace Harassment and Discrimination

We are committed to providing a workplace free of harassment. All staff shall treat others with respect and shall avoid behaviors that are or can reasonably be construed as discrimination or harassment. We prohibit conduct such as discrimination based on the basis of gender, age, race, harassment, and sexual solicitation. As such, the (clinic name) will:

- Uphold your individual rights to fair treatment
- Investigate reported incidents in a prompt, objective, and sensitive manner
- Take any corrective action needed
- Ensure that you will never be penalized in any way for making a complaint or giving evidence in an investigation of harassment unless it is proven to be malicious and without foundation.

Harassment can come in three forms:

Personal Harassment

- Any offensive comments and/or behaviour that are directed at any staff member, volunteer, or member of the public.

Employment Harassment

- Any discriminatory comments and/or behaviour at, or related to, the workplace which is directed at or is offensive to any staff member, physician or member of the public.

Sexual Harassment

- Any unwelcome conduct, comment, gesture or contact of a sexual nature which is likely to cause offense or humiliation to any individual or which might reasonably be perceived as placing a condition of a sexual nature on employment, opportunity, or advancement, or any term or condition of employment.

Harassment can be inflicted in a variety of actions including:

- Verbal abuse or threats
- Unwelcome remarks, jokes, innuendos, or taunting about a person's body, race, religion, gender, physical characteristics, age, sexual orientation, marital status, or ethnic origin
- Displaying of pornographic, sexually explicit, racist or other offensive or derogatory material
- Unwelcome comments, invitations, requests, or other activities, whether indirect or explicit, that cause intimidation or fear
- Leering or other gestures
- Condescendence or paternalism which undermines self-respect
- Physical assault
- Unnecessary physical contact, such as touching, patting, pinching, or punching
- Any retaliatory conduct or action arising out of harassment or an alleged harassment situation

If you are faced with a harassment situation, you should:

- If possible make your objections known to the person responsible. Talk with the clinic manager or lead physician if you require support or advice in talking with the person responsible
- Keep a written record of the date, time, location, and nature of the behaviour, as well as any witnesses

- If the harassment continues, speak with (name). If they are the person responsible, or you are not satisfied with their response, take your complaint to another clinic authority person, whether it is the manager, lead physician, or another physician

This process does not prejudice your right to file a complaint with the Human Rights Commission, take civil action or report incidents to the police.

7.5 Working Alone

(Clinic name) is committed to providing a workplace environment that upholds personal safety principles. When working alone or working afterhours please avoid situations that may endanger your personal safety. If you have any concerns for personal safety while at the clinic please discuss your concerns with your supervisor.

Some best practices are common to all working alone situations. These include proper employee training and having an effective communications system so that employees who are working alone can easily contact someone in case of an emergency. These measures are effective in reducing the risk associated with working alone.

7.6 Facility Emergency Disaster Response Plan

Employees must be informed of (clinic name)'s plans for an emergency/disaster event. Please see sample in Appendix 2 (Facility Emergency Response Plan).

8. Financial Approvals

Staff shall do their utmost to ensure that all transactions are authorized by the appropriate person and executed in a timely fashion in accordance with accepted financial standards. Staff shall use best efforts to ensure that all assets, liabilities and transactions are accurately and completely reported, supported by appropriate documentation and recorded and that no asset, liability or transaction is hidden or concealed from management and/or auditor.

8.1 Authorization Approvals

For financial authorization approvals for office, equipment or any purchases above \$_____ please see the Business Manager. If they are away, please note who has the authorization in their absence.

For financial authorization approvals for office, equipment or any purchases above \$ _____ please submit to the Business Manager who will seek approval from the Clinic Directors.

8.2 Petty Cash

The petty cash will be reconciled, locked and stored each night at closing in the (blank) office. (Name) has keys to the petty cash.

8.3 Use of Business Credit Cards

GUIDE: Inform employees of which positions get business credit cards, what they are allowed to use them on, who gets the statement, what the limit is etc.

(Clinic Name) gives business credit cards to (name positions). (Name) gets the statements and they have to be authorized and signed by (name). These credit cards can be used on...

8.4 Travel Policies and Mileage

GUIDE: Inform employees of the travel policies at the clinic, e.g. who is liable, what mileage the clinic will cover, how employees should pay for things that will be covered, what will be covered, etc.

If you are required to do business travel, the clinic will reimburse you for expenses (mileage, expenses) while conducting business. You must keep receipts and mileage log and submit these to (name) for reimbursement.

8.5. Insurance and Liability for Vehicles

GUIDE: Inform employees of the insurance available for their vehicles used for business travel and what liabilities they have.

(Clinic Name) offers insurance for vehicles used for...

8.6. Bonding

Inform any employees if bonding pertains to them and the clinic and what the process is.

9. Forms

Team Meeting Agenda

Date: May 10, 2012

Time: 12:00 – 1:00 pm

Place: Clinic Meeting Room

Agenda Item	Person Responsible	Time
1. Welcome and Review of Agenda	All	2 minutes
2. News and Current Events at the Clinic <ul style="list-style-type: none">▪ New staff▪ Progress on master referrals list▪ Cross-training on XYZ task, etc...	Physician A	10 minutes
3. Practice Review Status Update <ul style="list-style-type: none">▪ Regular meetings and request for agenda items▪ Developing a practice agreement▪ Role clarity and potential for some task sharing	Physician B	10 minutes
4. What is on the Horizon? <ul style="list-style-type: none">▪ Changes to front desk configuration▪ Filing process review	Physician C	10 minutes
5. Review of Action Items from Last Meeting (if any)	All	5 minutes
6. Questions and Close	All	5 minutes
7. Next Meeting Date		

Clinic Incident Report

To be completed by staff within twelve (12) hours of incident/accident.

Name of Clinic: _____

Address: _____

Phone: _____

Instructions: Please complete this form after an incident or accident on clinic premises. An incident can be a severe altercation with or among patients or staff, events that occurred that are dangerous to the staff or public, or where the police or emergency services were summoned (report required in such instances). Completed reports to be submitted to: _____

Check One:

- Incident An occurrence that **could have** led to harm or otherwise negative outcomes
- Accident An occurrence that **has** led to harm or otherwise negative outcome.

Date and Time of Incident/Accident: _____

Place of Incident/Accident: _____

Name of reporting staff: _____

Name of other staff involved/observed: _____

Patient(s) or external parties involved (provide names if known):

Were the police/emergency services called?

Yes

No

If yes, please provide detail of who responded (include name of officer/s) and how the incident was handled.

Issue (i.e.: stress point – what appeared to cause the incident/accident):

Describe the incident/accident (to the fullest extent reasonable):

Resolution to situation:

Further action required: Yes No

If yes, please describe below.

What action(s) should the clinic consider to prevent a recurrence of a similar incident?

Submitted By: _____ (Please print)

Signature: _____

Date: _____

Received By: _____ (Please print)

Signature: _____

Date: _____

Performance Review

Clinic Name

Date: _____
Employee Name: _____
Manager Name: _____
Review Period: From _____ to _____

A. Competencies

Both the employee and the supervisor must complete this section at the end of the review period. Carefully evaluate the employee’s work performance in relation to the essential competencies for the job. Refer to the Competency Dictionary and the position profile for more detailed. Check the rating box under the applicable performance description to indicate the employee’s performance. Indicate N/A if not applicable or unable to observe. A multi-rater approach to the evaluation of the core competencies will be incorporated into the summary comments.

Competency	Composite Rating		Employee Rating	
Problem Solving and Judgement (Refer to the Competency Dictionary for expected behaviours for this competency).	<input type="checkbox"/>	Exceeds Expectations Consistently	<input type="checkbox"/>	Exceeds Expectations Consistently
	<input type="checkbox"/>	Exceeds Expectations Occasionally	<input type="checkbox"/>	Exceeds Expectations Occasionally
	<input type="checkbox"/>	Meets Expectations	<input type="checkbox"/>	Meets Expectations
	<input type="checkbox"/>	Needs Improvement	<input type="checkbox"/>	Needs Improvement
Patient Focus (Refer to the Competency Dictionary for expected behaviours for this competency).	<input type="checkbox"/>	Exceeds Expectations Consistently	<input type="checkbox"/>	Exceeds Expectations Consistently
	<input type="checkbox"/>	Exceeds Expectations Occasionally	<input type="checkbox"/>	Exceeds Expectations Occasionally
	<input type="checkbox"/>	Meets Expectations	<input type="checkbox"/>	Meets Expectations
	<input type="checkbox"/>	Needs Improvement	<input type="checkbox"/>	Needs Improvement

Professionalism		Exceeds Expectations Consistently		Exceeds Expectations Consistently
(Refer to the Competency Dictionary for expected behaviours for this competency).		Exceeds Expectations Occasionally		Exceeds Expectations Occasionally
		Meets Expectations		Meets Expectations
		Needs Improvement		Needs Improvement
Teamwork		Exceeds Expectations Consistently		Exceeds Expectations Consistently
(Refer to the Competency Dictionary for expected behaviours for this competency).		Exceeds Expectations Occasionally		Exceeds Expectations Occasionally
		Meets Expectations		Meets Expectations
		Needs Improvement		Needs Improvement
Effectiveness		Exceeds Expectations Consistently		Exceeds Expectations Consistently
(Refer to the Competency Dictionary for expected behaviours for this competency).		Exceeds Expectations Occasionally		Exceeds Expectations Occasionally
		Meets Expectations		Meets Expectations
		Needs Improvement		Needs Improvement
Strategic Thinking		Exceeds Expectations Consistently		Exceeds Expectations Consistently
(Refer to the Competency Dictionary for expected behaviours for this competency).		Exceeds Expectations Occasionally		Exceeds Expectations Occasionally
		Meets Expectations		Meets Expectations
		Needs Improvement		Needs Improvement

B. This section outlines the goals and outcomes from the previous year.

Goals from previous year	Outcomes
1.	
2.	
3.	

C. This section outlines goals for the upcoming year.

Goals for upcoming year
1.
2.
3.

D. This section outlines development activities required to support goals.

Development Activity	Goal Supported	Target Date	Cost (if applicable)

E. Summary Comments/Feedback

Supervisor:

CLINIC NAME

Medical Office Assistant (MOA) - Position Profile

POSITION SUMMARY:

Working with the physician(s), this position is responsible primarily for the day-to-day administrative management of patients.

MAJOR DUTIES & RESPONSIBILITIES

- Maintain and set up appointment templates for each physician in EMR
- Answer incoming calls in a timely manner and schedule appointments based on patient requests, physician availability, and booking preference, confirm appointments for medicals and patients with a record of no-shows
- Organize, prepare and clean exam rooms and insure each room is appropriately stocked with supplies
- Investigate and follow up on missing test results as requested by physician
- Set up room and instrument trays for procedures as appropriate (e.g. mole removal, PAP, completes, etc.)
- Greet patients as they arrive and indicate arrival in EMR, confirming/updating patient demographics as needed
- Ensure the patients have received and signed all required consent forms for procedures and third party medicals
- Complete medical forms with patient demographics
- Escort the patient to the exam room ; provide instructions to prepare patient for visit (e.g. disrobing)
- Complete eye exams, urine dips, and patient vitals as appropriate and enter results into the EMR
- Chaperone intimate exams, as requested
- Monitor exam room occupancy to ensure exam rooms are filled
- Collect uninsured charges from patient; produce invoices and receipts as needed
- Book follow up appointments
- Book tests and referrals for urgent referrals and patients who need assistance
- Assemble referral packages as instructed by physician to send to Referral Coordinator
- Check EMR on an ongoing basis for instructions from physician
- Chart relevant data into patient charts in the EMR e.g. record faxes sent, Rx refills, etc.
- Ensure sharps and biohazard waste is disposed of appropriately
- Sterilize and repackage instrument kits
- Deliver all phone messages and mail to physicians
- Monitor general clinic medical supply inventory, re-order and stock supplies
- Provide other administrative support including reception, faxing and copying documents and processing incoming and outgoing mail/faxes.
- Perform other related duties, as required

REQUIRED SKILLS & ABILITIES

- Able to prioritize and manage multiple processes and tasks
- Maintain focus on the patient needs
- Perform tasks efficiently in a fast-paced environment
- Proficient computer skills or ability to learn computer skills

- Excellent verbal and written communication skills
- Excellent organizational skills
- Able to remain calm with difficult patients
- Maintain confidentiality of patient information
- Willing to learn new skills
- Able to take patient vitals and provide patient instructions for basic tests (e.g. urinalysis, eye exams, etc.)

REQUIRED QUALIFICATIONS

Professional Certification / Designations	<ul style="list-style-type: none"> • None
Education / Experience	<ul style="list-style-type: none"> • Completion of diploma or certificate program for Medical Office Assistant • Minimum of two year’s medical clinic experience is required • Equivalent combination of education/experience may be considered

SUPERVISION

Reports to:	<ul style="list-style-type: none"> • Clinic Manager
Position(s) supervised:	<ul style="list-style-type: none"> • None

COMPETENCY EXPECTATIONS

	Expected Competency Level
Effectiveness	2
Decision-Making	1
Communication	2
Helping Others	2
Self-Management	2
Leading Others	1

I have the opportunity to review this position profile and related competency dictionary and agree that is a fair representation of the expectations of this position as of the date of signing.

Employee Name :

Employee Signature

Date

Clinic Representative:

Clinic Representative Signature

Date

CLINIC NAME

Receptionist - Position Profile

POSITION SUMMARY: The Receptionist is responsible for appointment booking, reception and clerical duties for the clinic.	
MAJOR DUTIES & RESPONSIBILITIES	
<ul style="list-style-type: none">• Answer all incoming phone calls to the clinic• Greet and register all patients as they arrive at the clinic• Schedule all appointments for the clinic physicians• Schedule appointments on the patients' behalf for external medical imaging and scheduled lab tests, as required• Verify all patient demographic information with the patient• Register new patients' Alberta Healthcare Card numbers, and set up a new patient chart in the EMR• Ensure that out of province health cards and immigration papers are copied for verification• Verify patient chart numbers and labels are on the correct charts• Record messages for physicians and staff and provides appropriate information to support the message where applicable• Print daily credit and debit card transaction reports• Conduct patient traffic control and act as an information desk for patients• Book follow-up appointments for patients as per physician instruction• Create and maintains confidential medical files and records• Manage telephone answering and message functions• Maintain physician schedule in the EMR• Represent the physician in a professional manner•	
REQUIRED SKILLS & ABILITIES	
<ul style="list-style-type: none">• Excellent phone etiquette• Ability to multi-task• Able to effectively communicate in various forms (e.g. verbal, written) to members of a team• Exceptional typing ability• Ability to remain professional in stressful situations• Timely voicing of concerns to doctors and nurses• Ability to complete requested tasks in a timely fashion• Maintain confidentiality of patient information	
REQUIRED QUALIFICATIONS	
Professional Certification / Designations	<ul style="list-style-type: none">• None required• Medical Office Assistant training is an asset•
Education / Experience	<ul style="list-style-type: none">• Medical clinic experience is an asset• Past office administration training (unit clerk, office receptionist, administrative assistant, secretarial) is desirable

SUPERVISION	
Reports to:	<ul style="list-style-type: none"> • Clinic Manager
Position(s) supervised:	<ul style="list-style-type: none"> • None
COMPETENCY EXPECTATIONS	
	Expected Competency Level
Effectiveness	1
Decision-Making	1
Communication	1
Helping Others	1
Self-Management	2
Leading Others	1

I have had the opportunity to review this position profile and related competency dictionary and agree that is a fair representation of the expectations of this position as of the date of signing.

Employee Name:

Employee Signature

Date

Clinic Representative:

Representative Signature

Date

CLINIC NAME

Billing Clerk - Position Profile

POSITION SUMMARY: The Billing Clerk is responsible for review, submission and reconciliation of insured and uninsured physician billings and management of accounts receivable.	
MAJOR DUTIES & RESPONSIBILITIES	
<ul style="list-style-type: none"> • Enter and submit physician fee-for-service billings to Alberta Health weekly • Prepare and submit WCB billings • Reconcile billings paid against billing submissions; investigate, correct and resubmit rejected billings • Prepare invoices for third party billings (e.g. insurance, legal) or uninsured services • Process accounts receivable payments against invoices • Monitor and send collection reminders for overdue invoices • Gather and reconcile daily receipts for cash, credit card and debit transactions • Prepare bank deposit for cash and cheques received • Prepare billing statements for physician detailing amounts owed/receivable from various sources • Research and respond to billing enquiries, act as an information resources for questions about billing rules 	
REQUIRED SKILLS & ABILITIES	
<ul style="list-style-type: none"> • Excellent and current knowledge of Schedule of Medical Benefits and billing rules • Excellent EMR computer skills and data entry accuracy • Basic knowledge of medical terminology and clinic processes • Exhibit high level of attention to detail • Protect and maintain privacy and confidentiality 	
REQUIRED QUALIFICATIONS	
Professional Certification / Designations	<ul style="list-style-type: none"> • None
Education / Experience	<ul style="list-style-type: none"> • At least two year's billing experience; billing seminar attendance
SUPERVISION	
Reports to:	<ul style="list-style-type: none"> • Clinic Manager
Position(s) supervised:	<ul style="list-style-type: none"> • None
COMPETENCY EXPECTATIONS	
	Expected Competency Level
Effectiveness	2

Decision-Making	2
Communication	2
Helping Others	1
Self-Management	2
Leading Others	1

I have had the opportunity to review this position profile and related competency dictionary and agree that is a fair representation of the expectations of this position as of the date of signing.

Employee Name:

Employee Signature

Date

Clinic Representative:

Representative Signature

Date

CLINIC NAME

Referral Coordinator - Position Profile

POSITION SUMMARY:	
The Referral Coordinator is responsible for scheduling and tracking all specialist appointments and tests.	
MAJOR DUTIES & RESPONSIBILITIES	
<ul style="list-style-type: none">• Develop linkages with various community health resources to deal with patients requiring treatment and referral• Develop and manage patient referral programs• Book specialist appointments and tests for patients• Ensure that required documentation [requisitions, letters, lab work] are forwarded to specialist clinic or diagnostic clinic as identified to complete booking• Confirm appointments and tests with patients• Record appointment information in EMR• Maintain updated information on patient chart in EMR on specialists booking information on a timely basis• Ensure that all patient documentation is forwarded for scanning to chart on a timely basis• Follow up on appointments on regular basis• Follow up on all DI booking for reports• Prepare statistics / information on wait times for various appointments as requested• Research reports, lab work and letters at physicians requests• Maintain specialist database with current information	
REQUIRED SKILLS & ABILITIES	
<ul style="list-style-type: none">• Excellent phone etiquette• Ability to multi-task• Attention to detail and thoroughness• Able to effectively communicate in various forms (e.g. verbal, written) to members of a team• Exceptional typing ability• Aptitude using MS Word and MS Excel• Maintain confidentiality of patient information• Working knowledge of basic medical terminology	
REQUIRED QUALIFICATIONS	
Professional Certification / Designations	<ul style="list-style-type: none">• Medical Office Assistant training is an asset
Education / Experience	<ul style="list-style-type: none">• Minimum of one year's medical clinic experience is required
SUPERVISION	
Reports to:	<ul style="list-style-type: none">• Clinic Manager

Position(s) supervised:	<ul style="list-style-type: none"> • None
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COMPETENCY EXPECTATIONS	
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	Expected Competency Level
Effectiveness	2
Decision-Making	1
Communication	2
Helping Others	1
Self-Management	2
Leading Others	1

I have had the opportunity to review this position profile and related competency dictionary and agree that is a fair representation of the expectations of this position as of the date of signing.

Employee Name:

Employee Signature

Date

Clinic Representative:

Representative Signature

Date

CLINIC NAME

Clinical Assistant I - Position Profile

POSITION SUMMARY:

Working with the physician(s), this position is responsible for the day-to-day clinical and administrative management of patients.

MAJOR DUTIES & RESPONSIBILITIES

- Conduct chart reviews for next day's appointments to determine preparatory visit requirements; investigate and follow up on missing test results
- Set up room and instrument trays for procedures as appropriate (e.g. mole removal, PAP, completes, etc.)
- Greet and escort patient to exam room; provide instructions to prepare patient for visit (e.g. disrobing)
- Monitor exam room occupancy to ensure exam rooms are filled
- Take patient vitals (height, weight, BMI, blood pressure) and conduct any pre-work as appropriate to patients symptoms, attributes or reasons for visit (e.g. glucose test, urinalysis, temperature, vision, lung capacity, etc.)
- Complete medical forms with patient demographics
- Assist physician with minor medical procedures including dressings, suture removal, and PAP tests
- Clean and restock exam rooms, sterilize and repackage instrument kits
- Provide patient education to support patient wellness
- Receive incoming phone calls to station from pharmacy, Home Care, patients and other physicians; take messages or consult physician
- Book tests and referrals for urgent referrals and patients who need assistance
- Assemble referral packages to send to Referral Coordinator
- Check EMR on an ongoing basis for instructions from physician
- Chart all Assistant's actions into the EMR in patient charts e.g. record faxes sent, Rx refills, etc.
- Ensure sharps and biohazard waste is disposed of appropriately
- Clean and sterilize medical equipment
- Monitor general clinic medical supply inventory, re-order and stock supplies
- Perform other related duties, as required

REQUIRED SKILLS & ABILITIES

- Able to prioritize and manage multiple processes and tasks
- Maintain focus on the patient needs
- Perform tasks efficiently in a fast-paced environment
- Proficient computer skills or ability to learn computer skills
- Excellent verbal and written communication skills
- Excellent organizational skills
- Able to remain calm with difficult patients
- Maintain confidentiality of patient information
- Willing to learn new skills

REQUIRED QUALIFICATIONS	
Professional Certification / Designations	<ul style="list-style-type: none"> Formal nursing education, LPN or RN (may not be current in certification)
Education / Experience	<ul style="list-style-type: none"> Several years clinic experience is an asset Medical Office Assistant training coupled with greater than 5 years family practice clinic experience would be considered
SUPERVISION	
Reports to:	<ul style="list-style-type: none"> Clinic Manager
Position(s) supervised:	<ul style="list-style-type: none"> None
COMPETENCY EXPECTATIONS	
	Expected Competency Level
Effectiveness	2
Decision-Making	2
Communication	2
Helping Others	2
Self-Management	2
Leading Others	1

I have the opportunity to review this position profile and related competency dictionary and agree that is a fair representation of the expectations of this position as of the date of signing.

Employee Name:

Employee Signature

Date

Clinic Representative:

Representative Signature

Date

CLINIC NAME

Clinical Assistant II - Position Profile

POSITION SUMMARY:

Working with the physician(s), this position is responsible for the clinical and administrative management of patients and provision of patient care. This position will generally have formal nursing training.

MAJOR DUTIES & RESPONSIBILITIES

- Conduct chart reviews for next day's appointments to determine preparatory visit requirements; investigate and follow up on missing test results
- Review charts to identify patient screening requirements as per protocol (e.g. mammogram, PSA)
- Set up room and instrument trays for procedures as appropriate (e.g. mole removal, PAP, completes, etc.)
- Escort patients to exam room and gather patient history
- Triage and assesses acuity based on reported patient symptoms (via phone or in waiting room)
- Monitor multiple exam rooms for occupancy and stage in the exam to ensure efficient patient flow between multiple rooms and providers
- Take patient vitals (height, weight, BMI, blood pressure) and conduct any pre-work as appropriate to patients symptoms, attributes or reasons for visit (e.g. glucose test, urinalysis, temperature, vision, lung capacity, etc.)
- Complete medical forms with patient demographics and medical history
- Prepare patient, hook up monitor and perform ECGs with pre- and post- stress test vital sign measurement, as appropriate
- Prepare chest X-ray and audiogram forms
- Administer injections including B12, allergy, immunization
- Assist physician in with various medical procedures including wound dressings, suture removal, PAP tests, casting, vision test, mini mental exams, excisions, laceration treatment, ear syringing etc. as allowed by licensing
- Order lab work based on pre-established protocols and setup repeat lab requisitions
- Clean and restock exam rooms, sterilize and repackage instrument kits
- Provide patient education to support patient wellness and provide information about tests/procedures
- Communicate lab and x-ray results to patients
- Fax physician approved prescription refills based on pre-established protocols
- Act as liaison between physician office and pharmacies, insurance companies and other health facilities
- Check EMR on an ongoing basis for instructions from physician
- Chart all Assistant's actions into the EMR in patient charts e.g. record faxes sent, Rx refills, etc.
- Monitor general clinic medical supply inventory, re-order and stock supplies
- Stock pharmaceutical supplies and ensure that all expired medications and other products are destroyed on a regular basis in accordance with clinic policies and procedures
- Maintain crash cart, oxygen and suction equipment
- Respond to clinic codes, if required
- Perform other related duties, as required

REQUIRED SKILLS & ABILITIES	
<ul style="list-style-type: none"> • Able to prioritize and manage multiple processes and tasks • Maintain focus on the patient needs • Perform tasks efficiently in a fast-paced environment • Proficient computer skills or ability to learn computer skills • Excellent verbal and written communication skills • Excellent organizational skills • Able to remain calm with difficult patients • Willing to learn new skills • Maintain confidentiality of patient information • Able to administer injections • Authorized by licensing body to perform required procedures as applicable (e.g. ear syringing, etc.) 	
REQUIRED QUALIFICATIONS	
Professional Certification / Designations	<ul style="list-style-type: none"> • Formal nursing education, LPN or RN
Education / Experience	<ul style="list-style-type: none"> • Several years clinic experience is an asset • Some medical knowledge required (how to deal with a cardiac arrest, measurements)
SUPERVISION	
Reports to:	<ul style="list-style-type: none"> • Clinic Manager
Position(s) supervised:	<ul style="list-style-type: none"> • None
COMPETENCY EXPECTATIONS	
	Expected Competency Level
Effectiveness	2
Decision-Making	3
Communication	3
Helping Others	3
Self-Management	2
Leading Others	2

I have the opportunity to review this position profile and related competency dictionary and agree that is a fair representation of the expectations of this position as of the date of signing.

Employee Name:

Employee Signature

Date

Clinic Representative:

Representative Signature

Date

CLINIC NAME

Medical Secretary - Position Profile

POSITION SUMMARY:	
The Secretary has primary responsibility for typing and patient documentation related to communication with external parties. (referrals, medico-legal, consult letters, WCB, Human Resources).	
MAJOR DUTIES & RESPONSIBILITIES	
<ul style="list-style-type: none"> • Type all medical-legal and outgoing referral letters for the clinic • Transcribe dictation for all other outgoing physician correspondence • Type cover letters for documents, as required • Verify correct doctor and chart information is attached to outgoing documents • Type chart summaries for chart copy requests • Ensure information release consent forms are completed and filed • Track and note all correspondence in the appropriate EMR patient chart • Create invoices using a standard fee chart for third-party billings and send with documentation • Process forms prepayment for out of province billing or specific companies, as required • Route (for physician signature, etc.) and distribute outgoing correspondence • Maintain and update computer folders every month • Retrieve filed paper documentation, as needed • Assist with filing, as needed • Assist with report scanning and transcription, as needed 	
REQUIRED SKILLS & ABILITIES	
<ul style="list-style-type: none"> • Excellent typing skills (speed and accuracy) – minimum 60 – 70 words per minute • Proficient computer skills, especially Microsoft Word and EMR software • Knowledge of medical terminology is desirable • Excellent spelling and grammar • Able to categorize, understand and organize documentation quickly and efficiently • Protect and maintain privacy and confidentiality 	
REQUIRED QUALIFICATIONS	
Professional Certification / Designations	<ul style="list-style-type: none"> • None
Education / Experience	<ul style="list-style-type: none"> • Medical secretary or office administration diploma/certificate • Minimum of one year's medical clinic experience is required
SUPERVISION	
Reports to:	<ul style="list-style-type: none"> • Clinic Manager

Position(s) supervised:	• None	
COMPETENCY EXPECTATIONS		
	Expected Competency Level	
Effectiveness	2	
Decision-Making	1	
Communication	2	
Helping Others	1	
Self-Management	2	
Leading Others	1	

I have the opportunity to review this position profile and related competency dictionary and agree that is a fair representation of the expectations of this position as of the date of signing.

Employee Name:

Employee Signature

Date

Clinic Representative:

Representative Signature

Date

CLINIC NAME

Business Manager / Office Manager - Position Profile

POSITION SUMMARY:

The Clinic Manager has primary responsibility for all clinic operations and financial management.

MAJOR DUTIES & RESPONSIBILITIES

Financial Management

- Responsible for overall clinic financial and cash flow management
- Develop annual clinic budget
- Oversee monthly financial statement creation; review, analyze and interpret financial statements
- Oversee and approve payments for payables
- Ensure supplies are purchased per approval policies, to meet the clinic needs
- Oversee timely and accurate submission of billings, reconciliation of reject billings
- Oversee preparation of invoices for uninsured services and related collections
- Review EMR billing, statistics and outstanding Accounts Receivable reports and reconcile to general ledger for accuracy and completeness
- Ensure billing staff are trained and current on changes in the Schedule of Medical Benefits and rules/rates and EMR functionality
- Manage and review application of new physician payment rules and programs (e.g. business costs program)
- Ensure reconciliation of physician payment/income records on a monthly basis and prepare physician reports
- Monitor actual expenditures and overhead contributions against projections and make recommendations to Physician Executive for adjustments
- Gather background data and conduct data analysis for any financial decision-making as requested by physicians (e.g. overhead allocation discussion)
- Review and approve physician payments, advances and electronic funds transfers
- Ensure appropriate internal financial controls are in place to prevent error or fraud.
- Ensure all working papers are prepared for external accountant(s)

Human Resources

- Supervise staff on a daily basis
- Mediate staff conflict issues and manage any staff disciplinary concerns
- Responsible for compliance with Employment Standards regulations
- Responsible for recruitment, interview, hiring and termination of all clinic staff
- Develop and maintain a clinic staff orientation process and checklist for training
- Conduct 3 month probationary reviews with new staff; monitor and identify additional training needs
- Administer staff benefits package including orienting and setting up new employees
- Organize and chair staff meetings on a regularly scheduled basis
- Maintain current staff job profiles
- Deploy and maintain a staff performance management system
- Ensure staff understand have access to all human resources policies and procedures
- Establish changes to most office/human resources policies

- Consult with Physician Executive for any significant office/human resource policy changes

Payroll

- Oversee and approve payroll submission and administer rate adjustments
- Conduct regular scan of market rates for wages and make recommendations to Physician Executive for rate changes
- Review banked, sick and vacation time and apply Human Resources policy
- Oversee ROE preparation and reconciliation of payroll source deductions

Operations Management

- Meet weekly with Physician Executive and coordinate physician meetings
- Analyze and balance staff workload deploying staff to effectively support physicians
- Participate in special projects – AIM, practice improvements
- Initiate, analyze and implement major EMR or changes in clinic processes
- Manage physicians questions – analysis of activity at station, assist with operational queries
- Recruit new physicians and manage agency agreements
- Responsible for ensuring appropriate insurance coverage
- Ensure clinic policies and procedures manual is documented, regularly updated, and distributed to all staff and physicians
- Ensure process documentation for all major clinic processes is documented, regularly updated and kept on file
- Ensure staff are trained and clinic is in compliance with the Health Information Act
- Ensure all information agreements are signed and current (e.g. Information Sharing Agreement, Disclosure Agreement, Information Manager Agreement, Staff Confidentiality Oaths)
- Monitor facility cleaning, security, maintenance and liaise with service personnel
- Primary liaison with all external parties for leasehold improvements
- Manage patient complaints about clinic/ physicians and report to the individual doctor(s) and Physician Executive

Capital Asset/IT Management and Maintenance

- Negotiate and manage all leases and contracts on behalf of clinic for capital assets and services (building lease, major equipment, hardware/software, phone system, janitorial, etc.)
- Manage all procurement for major equipment purchases (exam tables, phone system)
- Develop and maintain relationships with Electronic Medical Record (EMR) software provider representative(s), and support personnel
- Train staff and medical providers on EMR software
- Communicate with computer and phone system service providers to maintain operations and install updates as required
- Annual review and update (as required) of Privacy Impact Assessment documentation

REQUIRED SKILLS & ABILITIES

- Ability to recruit, retain and manage staff
- Ability to effectively communicate orally and in writing
- Ability to lead change management processes
- Ability to lead conflict resolution processes

- Proficiency in PCs and PC based programs and applications
- Proficiency in physician billing, invoice and payment reconciliation practices
- Skill in developing and maintaining effective working relationships with physicians, staff, patients, public, and external agencies
- Ability to take initiative and to exercise independent judgment, decision-making skills, and problem-solving expertise
- Maintain confidentiality of patient, clinic financial and information and physician and staff confidential matters
- Knowledge of the Health Information Act
- Knowledge of Alberta Employment Standards

REQUIRED QUALIFICATIONS

Professional Certification / Designations	<ul style="list-style-type: none"> • Health care, management or financial training and or designation would be an asset
Education / Experience	<ul style="list-style-type: none"> • At least 5 + years of work experience in supervisory/management role

SUPERVISION

Reports to:	<ul style="list-style-type: none"> • Physician Executive
Position(s) supervised:	<ul style="list-style-type: none"> • All staff

COMPETENCY EXPECTATIONS

	Expected Competency Level
Effectiveness	3
Decision-Making	3
Communication	3
Helping Others	3
Self-Management	3
Leading Others	3

I have the opportunity to review this position profile and related competency dictionary and agree that is a fair representation of the expectations of this position as of the date of signing.

Employee Name:

Employee Signature

Date

Clinic Representative:

Representative Signature

Date

CLINIC NAME

Dietician - Position Profile

POSITION SUMMARY: The Dietician will develop, implement and evaluate food and nutritional strategies, conduct nutritional and patient assessments using a variety of assessment methods, and develop and apply patient screening protocols.	
MAJOR DUTIES & RESPONSIBILITIES	
<ul style="list-style-type: none">• Conduct patient nutritional assessments and document case history• Develop and coordinate food and nutritional strategies for individual patients relevant to their case history and health goals• Organizes and implements nutrition education programs for individuals or groups of patients• Work with other members of an interdisciplinary team to develop integrated care protocols as well as individual patient care plans• Identifies and/or develops nutrition and healthy living educational resources and materials• Develop and deliver nutritional programs and policies• Develop linkages with various community health resources• Establish and maintain confidential patient records• Communication to family physician of patient status/progress• Collect and maintains data for individual client and program evaluation• Perform general administrative tasks, including billing and filing, as needed	
REQUIRED SKILLS & ABILITIES	
<ul style="list-style-type: none">• Excellent knowledge of nutrition for health promotion and disease prevention, with emphasis on interdisciplinary team approaches• Able to apply a variety of assessment methods to assess patients• Ability to effectively communicate orally, in writing, in person, on the telephone and electronically• Proficient knowledge of PCs and PC based programs and applications• Ability to work in a busy medical office environment, with minimal support• Good organizational skills• Ability to manage multiple tasks• Ability to establish a professional rapport with and instill confidence in, patients• Understanding of the Alberta Schedule of Medical Benefits, Alberta Health Care Insurance Plan payment system and Alberta practice environment (preferred but not required)	
REQUIRED QUALIFICATIONS	
Professional Certification / Designations	<ul style="list-style-type: none">• Four year degree with a major in Food and Nutrition• Registered with the College of Dieticians of Alberta
Education / Experience	<ul style="list-style-type: none">• Minimum of two years related work experience

SUPERVISION	
Reports to:	•
Position(s) supervised:	• None
COMPETENCY EXPECTATIONS	
	Expected Competency Level
Effectiveness	2
Decision-Making	3
Communication	3
Helping Others	3
Self-Management	3
Leading Others	2

I have the opportunity to review this position profile and related competency dictionary and agree that is a fair representation of the expectations of this position as of the date of signing.

Employee Name:

Employee Signature

Date

Clinic Representative:

Representative Signature

Date

Clinic Name

Mental Health Navigator – Position Profile

POSITION SUMMARY:

The Mental Health Navigator is responsible for the coordination of mental health care for patients of the clinic, and referral of patients to external health care providers.

MAJOR DUTIES & RESPONSIBILITIES

- Interview patients to develop case histories
- Participates in early detection of emerging patient mental health concerns
- Connect patients to programs and services including appointment scheduling, reminders, completion of required referral documentation and post-appointment confirmation and documentation follow-up
- Develops positive working relationships/partnerships with other disciplines, agencies and health care professionals in order to promote coordinated service, quality care and access to appropriate resources for clients.
- Provides and documents relevant clinical information, referral correspondence, patient interaction and patient care plans in a timely manner on patient files.
- Participates in multi-disciplinary case conferences
- Maintains a high level of current knowledge and trends in the relevant discipline specific skills and practices.
- Develop and apply patient screening protocols
- Provides consultation and education to support other health care service providers in regard to mental health/mental illness care planning
- Manage information through an electronic mental health resource directory
- Contributes to the establishment and maintenance of mental health resources and maintaining positive connections with community resources for the benefit of clients
- Communication to family physician of patient status/progress
- Collect and maintains data for individual client and program evaluation
- Perform general administrative tasks, including billing and filing, as needed

REQUIRED SKILLS & ABILITIES

- Knowledge of psychiatric nursing and clinical therapeutic models of client care, with emphasis on interdisciplinary team approaches
- Knowledge of psychiatric illnesses and medication skills
- Ability to deal effectively with difficult behaviours sometimes exhibited by people in distress
- Understanding of Alberta Schedule of Medical Benefits, Alberta Health Care Insurance Plan payment system and Alberta practice environment (preferred, but not required)
- Understands and follows applicable legislation (e.g., Mental Health Act, Child Welfare Act, Health Information Act).
- Working knowledge of local and provincial mental health resources.
- Proficient knowledge of PCs and PC based programs and applications
- Ability to communicate effectively orally, electronically or in writing
- Ability to work in a busy medical office environment with minimal support

- Good organizational and multi-tasking skills
- Maintain absolute confidentiality of patient records

REQUIRED QUALIFICATIONS

Professional Certification / Designations	<ul style="list-style-type: none"> • Two year diploma in psychiatric nursing preferred (graduate of a recognized psychiatric nursing program) • Current member of the Registered Psychiatric Nurses Association of Alberta (RPNAA) • A Criminal Record and Vulnerable Sector check
Education / Experience	<ul style="list-style-type: none"> • Minimum of five years mental health experience, or equivalent combination of education and experience

SUPERVISION

Reports to:	<ul style="list-style-type: none"> •
Position(s) supervised:	<ul style="list-style-type: none"> • None

COMPETENCY EXPECTATIONS

	Expected Competency Level
Effectiveness	2
Decision-Making	3
Communication	3
Helping Others	3
Self-Management	3
Leading Others	2

I have the opportunity to review this position profile and related competency dictionary and agree that is a fair representation of the expectations of this position as of the date of signing.

Employee Name:

Employee Signature

Date

Clinic Representative:

Representative Signature

Date

Clinic Name

Pharmacist – Position Profile

POSITION SUMMARY:	
The Pharmacist determines, monitors and manages patient drug therapy, both independently and in collaboration with other health care professionals.	
MAJOR DUTIES & RESPONSIBILITIES	
<ul style="list-style-type: none"> • Provide clinical service for complex and chronic care patients including medication reviews and education on safe and appropriate use of medication • Develop and apply patient screening protocols • Assess, develop and evaluate pharmacy care plans for patients in conjunction with a family physician, where applicable • Provide advice on optimal drug therapy, managing patient outcomes and monitoring appropriate use and efficacy of medications • Participate in development and implementation of interdisciplinary team protocols including wellness promotion and disease management • Communication to family physician of patient status/progress • Collect and maintains data for individual client and program evaluation 	
REQUIRED SKILLS & ABILITIES	
<ul style="list-style-type: none"> • Excellent knowledge of pharmacy practice with emphasis on interdisciplinary team approaches • Ability to effectively communicate orally, in writing, in person, on the telephone and electronically • Proficient knowledge of PCs and PC based programs and applications • Ability to work in a busy medical office environment, with minimal support • Good organizational skills • Maintain absolute confidentiality of patient records • Ability to manage multiple tasks • Ability to establish a professional rapport with and instill confidence in, patients • Ability to deal effectively with difficult behaviour sometimes exhibited by people in distress 	
REQUIRED QUALIFICATIONS	
Professional Certification / Designations	<ul style="list-style-type: none"> • Bachelor’s Degree in Pharmacy • Licensed with the Alberta College of Pharmacists • A Criminal Record and Vulnerable Sector check
Education / Experience	<ul style="list-style-type: none"> • Minimum of 2 years related experience in a community or primary care setting
SUPERVISION	
Reports to:	<ul style="list-style-type: none"> •
Position(s) supervised:	<ul style="list-style-type: none"> •

COMPETENCY EXPECTATIONS	
	Expected Competency Level
Effectiveness	3
Decision-Making	3
Communication	3
Helping Others	3
Self-Management	3
Leading Others	2

I have the opportunity to review this position profile and related competency dictionary and agree that is a fair representation of the expectations of this position as of the date of signing.

Employee Name:

Employee Signature

Date

Clinic Representative:

Representative Signature

Date

Clinic Name

Social Worker – Position Profile

POSITION SUMMARY:

The Social Worker helps individuals and families, develop the skills and resources they need to enhance their social functioning and social environments. Provides case-centered consultation to patients and has responsibility for the coordination of patient services, and then the referral of patients to external supports or health care providers.

MAJOR DUTIES & RESPONSIBILITIES

- Interview patients, their families and other concerned parties to obtain information about personal, social and environmental history.
- Provide a variety of casework and group work social services to patients and their families when personal, social or environmental difficulties exist which predispose illness or interfere with obtaining maximum benefits from medical care.
- Use a variety of assessment methods to assess problems and to design, implement and evaluate patient interactions/interventions
- Participate in early detection of emerging patient emotional and behavioural disorders
- Provides and documents relevant clinical information, referral correspondence, patient interaction and patient care plans in a timely manner on patient files.
- Connect patients to programs and services including appointment scheduling, reminders, completion of required referral documentation and post-appointment follow-up
- Advocate for patients by coordinating efforts to meet patient and family needs such as food, housing, transport and financial support.
- Develop and follow up with discharge and aftercare plans
- Develop positive working relationships/partnerships with other disciplines, agencies and health care professionals in order to promote coordinated service, quality care and access to appropriate resources for clients.
- Participate in multi-disciplinary case conferences and provide consultation and education to support other health care service providers
- Maintain a high level of current knowledge and trends in the relevant discipline specific skills and practices.
- Contribute to the establishment and maintenance of social support resources and maintaining positive connections with community resources for the benefit of clients
- Communication to family physician of patient status/progress
- Collect and maintains data for individual client and program evaluation
- Perform general administrative tasks, including billing and filing, as needed

REQUIRED SKILLS & ABILITIES

- Knowledge of social work and models of client care with emphasis on interdisciplinary team approaches
- Ability to deal effectively with difficult behaviours sometimes exhibited by people in distress
- Understanding of Alberta Schedule of Medical Benefits, Alberta Health Care Insurance Plan payment

- system and Alberta practice environment (preferred, but not required)
- Understands and follows applicable legislation (e.g., Mental Health Act, Child Welfare Act, Health Information Act).
 - Working knowledge of local and provincial mental health resources
 - Proficient knowledge of PCs and PC based programs and applications
 - Ability to communicate effectively orally, electronically or in writing
 - Ability to work in a busy medical office environment with minimal support
 - Good organizational and multi-tasking skills
 - Maintain absolute confidentiality of patient records

REQUIRED QUALIFICATIONS

Professional Certification / Designations	<ul style="list-style-type: none"> • Registered with the Alberta College of Social Workers • A Criminal Record and Vulnerable Sector check
--	--

Education / Experience	<ul style="list-style-type: none"> • Must have a diploma or bachelor's degree in social work • Minimum of two years social work experience
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1. SUPERVISION

Reports to:	<ul style="list-style-type: none"> •
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Position(s) supervised:	<ul style="list-style-type: none"> • None
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2. COMPETENCY EXPECTATIONS

	Expected Competency Level
Effectiveness	2
Decision-Making	3
Communication	3
Helping Others	3
Self-Management	3
Leading Others	2

I have the opportunity to review this position profile and related competency dictionary and agree that is a fair representation of the expectations of this position as of the date of signing.

Employee Name:

Employee Signature

Date

Clinic Representative:

Representative Signature

Date

Clinic Name

Medical Transcriptionist – Position Profile

POSITION SUMMARY:	
The Medical Transcriptionist is responsible for accurate transcription of physicians' clinical notes dictation.	
MAJOR DUTIES & RESPONSIBILITIES	
<ul style="list-style-type: none"> • Log incoming dictation tapes/disks and verify against physician schedules to ensure completeness • Enter and verify chart number, patient name and date • Type physician's dictated clinical notes from disks into each EMR patient chart • Track and verify dictation against each physician's day sheet to ensure each patient visit has a corresponding dictated note • Investigate any missing notes whether patients have been billed or were noted as a no-show in EMR • Verify previous day's system backup is complete, shred previous day's documents, erase completed disks and circulate back to physicians for new dictation • Retrieve filed batch tickets and send clarification requests to physicians' inbox with the relevant batch ticket attached • Proofread (type once, proofread once) • Act as resource to others e.g. investigate "missing" note • Perform other duties, as requested 	
REQUIRED SKILLS & ABILITIES	
<ul style="list-style-type: none"> • Exhibit high level of attention to detail • Excellent grasp of spelling, punctuation and grammar • Excellent knowledge of medical terminology, anatomy and physiology • Working knowledge of EMR • Able to concentrate and focus for extended periods of time • Excellent typing skills (speed and accuracy) – minimum 70-90 words per minute • Able to apply and understand logical context of dictation • Protect and maintain privacy and confidentiality • Able to present notes with very clear, standard style conventions for optimal readability 	
REQUIRED QUALIFICATIONS	
Professional Certification / Designations	<ul style="list-style-type: none"> • None
Education / Experience	<ul style="list-style-type: none"> • Medical Transcription diploma/certificate • Minimum of one year's medical clinic experience is required
SUPERVISION	
Reports to:	<ul style="list-style-type: none"> • Clinic Manager
Position(s) supervised:	<ul style="list-style-type: none"> • None
COMPETENCY EXPECTATIONS	
	Expected Competency Level
Effectiveness	2
Decision-Making	1
Communication	2
Helping Others	1

Self-Management	2
Leading Others	1

I have the opportunity to review this position profile and related competency dictionary and agree that is a fair representation of the expectations of this position as of the date of signing.

Employee Name:

Employee Signature

Date

Clinic Representative:

Representative Signature

Date

(Clinic Name)

CONFIDENTIALITY OATH

1 I, _____ agree that I will faithfully discharge my duties as an employee / volunteer / contracted service provider for **Clinic Name**, and will observe and comply with all policies and procedures of the clinic with respect to privacy, confidentiality, and security of health information.

2 I further acknowledge specific information handling and security practices which include:

- a. Information Handling and Security Procedures
- b. Laptop Security
- c. Wireless Networking / Remote Access Policies

3 I, _____, acknowledge that I am an employee / volunteer / contracted service provider for **Name Primary Care Network** and will observe and comply with all policies and procedures of **Clinic Name** with respect to the custodian's privacy, confidentiality, and security of health information.

4 Unless legally authorized to do so, I will not use or disclose health or business information (other than business card information) that comes to my knowledge or possession by reason of my affiliation with the clinic, including after I cease to be employed at the clinic.

5 I understand that a breach of this agreement may be just cause for termination of my employment or affiliation with the clinic.

6 I am aware that the clinic has policies and procedures regarding the privacy, confidentiality, and security of health information, and I understand that it is my responsibility to be familiar with the requirements outlined in these policies and procedures. I understand that I am to review these policies and procedures at time of hire, annually, if I change to a job position involving greater health information access or responsibility, or after an incident / breach at the clinic.

7 My use of the clinic's electronic medical record, Alberta Netcare, and other electronic applications may be monitored to ensure appropriate confidentiality, and security. Audit and access logs will be checked by the clinic system administrator periodically and/or if a breach of security or privacy is suspected. Netcare audits user access on a regular basis. A participating custodian and authorized affiliate may access and use information in Alberta Netcare when:

- a. They are in a current care relationship with the individual who is the subject of the information;
- b. They are providing health services to the individual either in the presence or absence of that individual;
- c. Their access to the information is necessary for the provision of the health services or for making a determination for a related health service; and
- d. The information is related to and necessary for the current session of care.

8 I understand that I can refer to the Clinic Privacy Officer, XXXXX for the details of these policies and any other information required for me to understand my obligations.

Employee Signature

Medical Practice / Physician Signature

Printed Name

Printed Name

Date

Date

Clinic Name

TIMESHEET

Employee Name: _____

WEEK OF: _____

Employee Number: _____

Supervisor: _____

Date Dd/mm/yr	Start Time	End Time	Total Regular Hrs	Overtime Hrs	Sick / Stat OR Vacation/PTO/ Unpaid hrs	Total Hrs
BI-WEEKLY TOTALS:						

Employee Signature: _____

Date: _____

Supervisor Signature: _____

Date: _____

TIME OFF REQUEST

Employee Name:

Supervisor:

I request the following time off as:

- Vacation Time
- Personal Time
- Unpaid Time

Starting on: _____ (dd/mm/yy) and ending on _____ (dd/mm/yy)

Employee Signature:

Date:

Supervisor Signature:

Date:

Clinic Name

TIME OFF REQUEST

Employee Name:

Supervisor:

I request the following time off as:

- Vacation Time
- Personal Time
- Unpaid Time

Starting on: _____ (dd/mm/yy) and ending on _____ (dd/mm/yy)

Employee Signature:

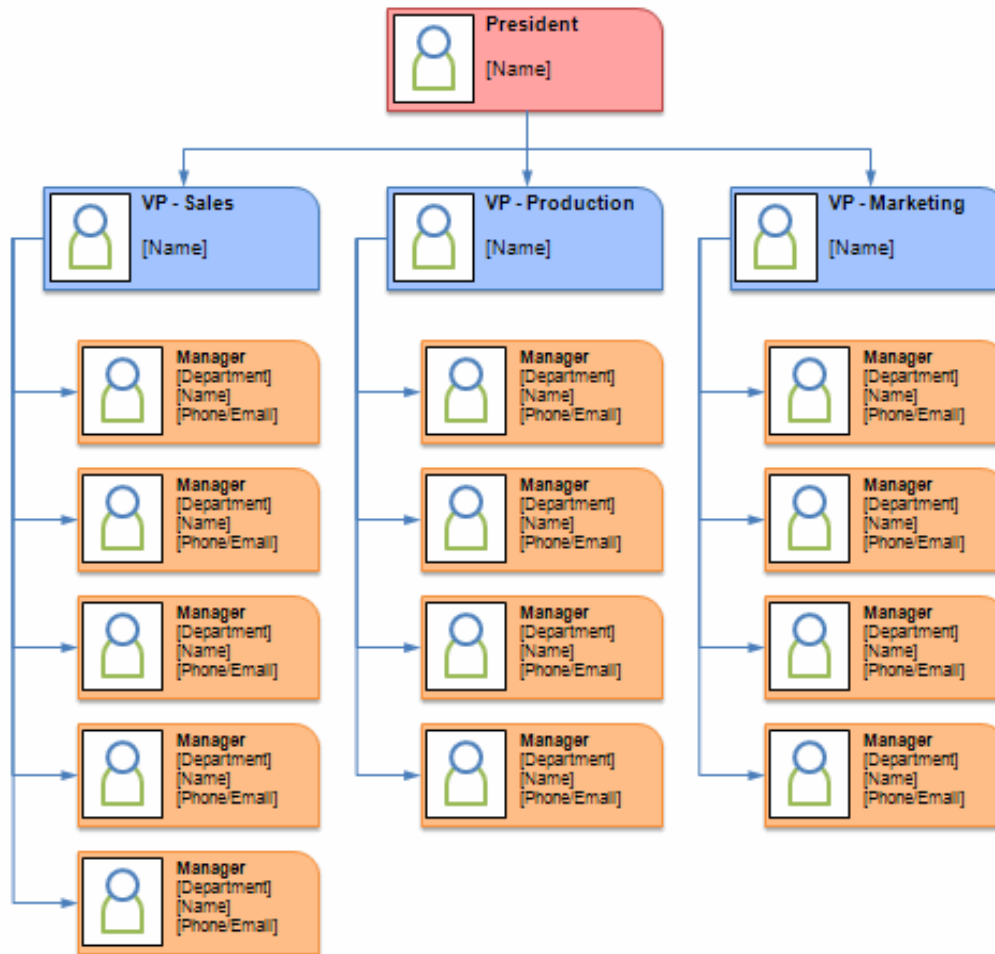
Date:

Supervisor Signature:

Date:

ORGANIZATIONAL CHART

Company Organizational Chart



APPENDIX 1 – PRIVACY AND SECURITY MANUAL

APPENDIX 2 – FACILITY EMERGENCY RESPONSE PLAN

APPENDIX 3 – COMPETENCY DICTIONARY
A Guide to Behavioral Expectations

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Introduction to Behavioral Competencies

Behavioral competencies are attitudes, behaviors, or other personal characteristics that are essential to be successful in a job.

While a typical job description lists the tasks, technical competencies and skills required, the overlay of behavioral competencies sets expectations about HOW something is done and not just WHAT is done.

The six main competency areas defined in this dictionary are:

- Effectiveness
- Decision-Making
- Communication
- Helping Others
- Self-Management
- Leading Others

Each competency area lists observable behaviors that define each.

Target Competency Levels

The competency levels are defined by the following three categories:

- Level 1 – Basic
- Level 2 – Intermediate
- Level 3 – Advanced

Each position in the organization has an associated target level for each competency area. A position may require only a basic level for some competency areas and a higher level for others. For example, the expectation for a receptionist may be at a Level 1 in terms of behaviors under “Leading Others” but at a Level 2 or 3 for behaviors under “Communication”.

Even though positions may vary in function they may have similar expectations for behavioral competencies.

At each defined competency level, the expectation is that the employee will demonstrate the behaviors in the previous level(s) as well as the behaviors in the target (higher) level.

The behaviors described under each competency target level are meant to be attainable within the scope of the individual’s position. They provide the measuring stick of expectations of what defines superior performance against which an employee’s individual performance is evaluated. Gaps between the target level for the position and the employee’s performance identifies specific areas of development and performance improvement.

COMPETENCY DICTIONARY

EFFECTIVENESS

These competencies relate to the ability to get things done accurately, completely and on time.

Results Orientation

Key Behaviors

LEVEL 1	LEVEL 2	LEVEL 3
<ul style="list-style-type: none"> • Is action oriented and energized by challenges • Delivers high quality results consistently • Gets things done on time • Takes appropriate initiative • Reports to relevant supervisor when results won't be achieved and identifies possible corrective actions /improvements to meet performance standards • Maintains necessary self-organization to achieve results 	<ul style="list-style-type: none"> • Develops clear goals for meetings and projects • Maintains commitment to goals, in the face obstacles or frustration • Seeks creative ways to meet goals • Follows through on issues • Has a sense of urgency about solving problems and getting work done • Aims for continuous improvement 	<ul style="list-style-type: none"> • Analyzes performance information to set priorities and improve delivery of services and operations • Develops challenging performance expectations to improve operations • Ensures the right mix of activities and resources are in place that lead to optimal results • Predicts emerging issues and manages associated risks

Thoroughness

Key Behaviors

LEVEL 1	LEVEL 2	LEVEL 3
<ul style="list-style-type: none"> • Acts to verify information • Checks the accuracy of own work • Organizes information or materials for others in a meaningful way 	<ul style="list-style-type: none"> • Checks the accuracy of others work • Monitors the quality of the team's work • Develops and uses systems to organize and keep track of information or work progress 	<ul style="list-style-type: none"> • Sets up procedures to ensure high quality of work (e.g. review meetings) • Reviews and verifies the accuracy of information at a management reporting level

DECISION-MAKING

These competencies relate to how information is gathered and applied to make decisions and solve problems.

Diagnostic Information Gathering

Key Behaviors

LEVEL 1	LEVEL 2	LEVEL 3
<ul style="list-style-type: none"> Identifies the specific information needed to clarify a situation or to make a decision Gets more complete and accurate information, by checking multiple sources Asks questions to clarify a situation Seeks out knowledgeable people to obtain information or clarify a problem 	<ul style="list-style-type: none"> Sees the perspective of everyone involved in a situation Probes skillfully to get at the facts, when others are reluctant to provide full, detailed information 	<ul style="list-style-type: none"> Questions others as to whether they have thought through a plan of action Questions others to assess their confidence in solving a problem or tackling a situation

Problem Solving and Judgment

Key Behaviors

LEVEL 1	LEVEL 2	LEVEL 3
<ul style="list-style-type: none"> Recognizes the scope of their own decision-making authority Breaks down a problem or a situation into discrete parts that are easier to manage Recognizes cause and effect relationships (“if this, then that” thinking) Checks to make sure the solution applied has resolved the problem Appropriately escalates issues 	<ul style="list-style-type: none"> Recognizes and considers several likely causes of events or multiple consequences Acquires new information and applies knowledge to analyze issues and resolve problems Notices discrepancies and inconsistencies in available information Identifies what is at the root of the problem (i.e. distinguishes symptoms from causes) Identifies a range of options and solutions to make improvements Demonstrates the ability to critically judge options going beyond drawing conclusions Considers the “big picture” when considering policies, processes or opportunities. 	<ul style="list-style-type: none"> Involves others in a process or decision, to ensure their support Weighs the costs, benefits, risks and chances for success, in making a decision Identifies a set of features, parameters, interests or considerations to take into account, in analyzing a situation or making a decision to develop win-win solutions Prioritizes work in alignment with organizational goals and strategies Anticipates and plans for implications and potential risks of a situation or action proactively Structures situations (e.g. the setting, persons present, sequence of events) to create a desired impact and to maximize

		the chances of a favorable outcome
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COMMUNICATION

These competencies relate to how information is shared and received.

Attention to Communication

Key Behaviors

LEVEL 1	LEVEL 2	LEVEL 3
<ul style="list-style-type: none"> • Ensures that information is passed on to others involved in a project or effort about new developments and plans • Communicates progress and problems proactively to team members or supervisor; avoids surprises • Expresses ideas clearly and concisely 	<ul style="list-style-type: none"> • Ensures that information from management is shared with direct reports and/or team members • Ensures that regular, consistent communication takes place • Summarizes or paraphrases understanding of what others have said to verify understanding and prevent miscommunication 	<ul style="list-style-type: none"> • Uses multiple channels or means to communicate important messages (e.g. email, memos, group meetings, newsletters, personal meetings) • Identifies and presents information in a way that is relevant and understood by each specific audience • Able to communicate persuasively so audience understands information, rationale and the personal impact on the audience

Interpersonal Awareness

Key Behaviors

LEVEL 1	LEVEL 2	LEVEL 3
<ul style="list-style-type: none"> • Listens objectively and attentively to people's ideas and concerns • Anticipates how others will react to a situation • Understands the interests and important concerns of others • Says or does things to address others' concerns 	<ul style="list-style-type: none"> • Makes others feel comfortable by responding in ways that convey interest in what they have to say • Understands both the strengths and weaknesses of others 	<ul style="list-style-type: none"> • Notices and accurately interprets what others are feeling, based on their choice of words, tone of voice, expressions, and other nonverbal behavior • Understands the unspoken meaning in a situation • Finds non-threatening ways to approach others about sensitive issues

HELPING OTHERS

These competencies relate to how we relate to and work with staff, physicians and patients.

Patient Focus

Key Behaviors

LEVEL 1	LEVEL 2	LEVEL 3
<ul style="list-style-type: none"> • Understands the importance of patient focus • Provides helpful information to patients • Seeks to fully understand the needs of the patient before responding • Responds to specific needs to the patient's satisfaction • Sees situations from the perspective of the patient • Corrects problems promptly in a non-defensive manner • Takes action to minimize patient dissatisfaction • Exhibits patience regardless of patients' demeanor and or lack of understanding, including, but not limited to, the elderly, handicapped, non-English speaking, etc. • Speaks favorably about the organization to increase patient confidence in the services it offers 	<ul style="list-style-type: none"> • Takes personal responsibility for addressing and correcting patient service problems • Develops understanding of who does what, and is able to refer patient appropriately • Provides appropriate service based on patient needs and requirements • Directs patient to the appropriate person or program as necessary with minimal impact on the patient 	<ul style="list-style-type: none"> • Balances the needs of a single patient with what is best for the entire patient population • Acts as a trusted advisor while looking for long-term benefits to the patient • Gives service beyond patients' expectations by seeking information about the real, underlying needs of the patient, providing insights, and recommending actions to address these needs • Finds ways to measure/track customer satisfaction

Teamwork

Key Behaviors

LEVEL 1	LEVEL 2	LEVEL 3
<ul style="list-style-type: none"> • Listens and responds constructively to other team members' ideas • Willingly shares knowledge and expertise with others when requested • Is open with other team members about his/her concerns 	<ul style="list-style-type: none"> • Recognizes when another staff member needs assistance • Solicits ideas and opinions to help form specific decisions or plans • Enlists the active participation of everyone • Values others' input and 	<ul style="list-style-type: none"> • Encourages and empowers others, making them feel valued and important • Provides leadership and support for a culture of recognition and appreciation • Provides opportunities for people to learn to work together

<ul style="list-style-type: none"> • Expresses disagreement constructively (e.g. by emphasizing points of agreement, suggesting alternatives that may be acceptable to the group) • Able to give and receive constructive feedback • Shares workload with others, and contributes by being prepared and completing assigned tasks • Acknowledges and thanks people for their contributions 	<p>expertise and is willing to learn from others</p> <ul style="list-style-type: none"> • Publicly credits other team members who have performed well • Promotes team cooperation (even during heated discussions) • Ensures team relationships are constructive (e.g., mutual support, respect, trust, openness, valuing diversity) • Works for solutions that all team members can support • Able to diplomatically offer knowledge and expertise in situations where they observe a team member struggling with their work 	<p>as a team</p> <ul style="list-style-type: none"> • Finds creative ways to make peoples' work rewarding • Ensures that all teams and team members are treated fairly • Provides formal recognition for a job well done by a team member or a team both within the teams and external to the team • Assists in mediating between team members to resolve conflict • Promotes cooperation with other work units
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SELF-MANAGEMENT

These competencies relate to how we portray ourselves and manage our own behavior.

Personal Credibility/Integrity

Key Behaviors

ALL LEVELS
<ul style="list-style-type: none"> • Demonstrates trustworthiness and reliability by keeping commitments and deadlines • Respects the confidentiality of information or concerns shared by others (e.g. patients, staff, physicians or otherwise) • Is honest and forthright with people • Carries his/her fair share of the work load • Takes responsibility for own mistakes; does not blame others • Does not engage in gossip or unnecessary sharing of negative, hurtful or personal information • Is punctual for work and meetings and keeps others updated if they are unable to be on time or attend.

Professionalism

Key Behaviors

LEVEL 1	LEVEL 2	LEVEL 3
<ul style="list-style-type: none"> • Demonstrates positive, timely and courteous service • Is clear, articulate and polite in dealing with patients and 	<ul style="list-style-type: none"> • Controls his/her response when criticized, attacked or provoked • Models the behavior expected 	<ul style="list-style-type: none"> • Demonstrates leadership through effective communication and interpersonal relationships

other staff <ul style="list-style-type: none"> • Remains calm under stress • Uses language that is appropriate and respectful • Demonstrates punctuality and personal responsibility for meeting obligations • Maintains a clean and neat appearance appropriate for a medical office 	of others <ul style="list-style-type: none"> • Maintains professionalism under pressure • Demonstrates support for other staff • Identifies what needs to be done and takes action before being asked or required to • Functions with minimal supervision 	<ul style="list-style-type: none"> • Demonstrates self-assurance and resourcefulness • Functions with no supervision
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LEADING OTHERS

These competencies relate to how effectively we provide leadership to manage people and make others successful.

Change Management

Key Behaviors

LEVEL 2	LEVEL 3
<ul style="list-style-type: none"> • Recognizes the significance and importance of managing the human reaction to change • Asks open-ended questions that create greater clarity, possibility or new learning • Able to identify and describe a need for change • Emphasizes the positive outputs and efforts of others striving toward the same outcome 	<ul style="list-style-type: none"> • Coaches others through the change process • Empathizes with individuals who struggle with change and provides strategies to help them overcome their resistance • Demonstrates a willingness to address obstacles to change even though it may mean facing hard truths and making tough decisions. • Successfully provides a visible anchor for others in times of change (i.e., by reaffirming key project goals) • Helps physicians and office staff to think more strategically and in the future tense • Sees the long-term implications of decisions and develops short term tactics in light of internal and external trends

Developing and Managing Others

Key Behaviors

LEVEL 1	LEVEL 2	LEVEL 3
<ul style="list-style-type: none"> • Recognizes and reinforces peoples developmental efforts and improvements • Shares information, advice and suggestions to help others be more successful • Expresses confidence in other's ability to be successful 	<ul style="list-style-type: none"> • Provides helpful, behaviorally specific feedback to others • Gives people assignments that will help develop their abilities 	<ul style="list-style-type: none"> • Regularly meets with employees to review their development progress • Works with employees to set clear goals, responsibilities and performance standards that are specific and measurable • Keeps informed about employees performance through

		<p>formal and informal methods (e.g. management by walking around)</p> <ul style="list-style-type: none">• Provides specific performance feedback, both positive and corrective, as soon as possible after an event• Deals firmly and promptly with performance problems
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