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| **Position****Description**Template |  | **Retail / Receptionist** |
| [Insert practice Name] |

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| **Practice:** |  |
| **Date:** |  |
| **Vision:** |  |
| **Mission:** |  |
| **Core Values:** |  |
| **Reports to:** | Optometrist / Principal OR Practice Manager |
| **Direct Reports:** | None |
| **Key Relationships:** | Optometrist/ PrincipalOptical DispenserReception StaffEmployee OptometristsSuppliersClients |
| **Primary Objectives** | * To make all patients feel great about their experience with us (WOW!)
* To provide friendly and efficient telephone and front office reception duties
* To support the optometrist and dispenser in advising patients on the most appropriate optical appliances for their specific needs
* To ensure that all patients receive the assistance they require
* To uphold the core values and professional standards for our optometry practice
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| **Qualifications / Experience** | Reception duties in a professional sales and / or health environmentMinimum Year 12 education |
| **Technical Knowledge** | * Proficient in Microsoft Office: Word, Outlook, Excel
* Exposure to Practice management software
* Understanding of optical products: frames, lenses, contact lenses, solutions
* Cash and banking procedures
* Telephone systems operations
* Appointments and work schedules
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| **Key Attributes / Competencies** | * Vibrant personality with great communication skills
* Strong customer service orientation
* Good organisational skills
* Team player
* High attention to detail
* Selling ability
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| **Key Result Areas** | Major Activities | **Performance Measures** |
| **1. Ensure efficient, friendly and customer-focused reception functions** | 1. Greet patients and visitors in a bright, friendly manner and promptly ascertain the reason for their visit
2. Book patients for appropriate appointments consistent with office schedules and practices
3. Confirm appointments 1 day prior
4. Follow up patients who do not attend their appointments
5. Advise patients booking in for full consultations of full fee and changes to Medicare
6. Answer patient queries wherever possible
7. Redirect incoming calls to appropriate staff or ensure accurate messages are written down and forwarded to staff member promptly
8. Provide refreshments to patients if their stay may be prolonged
9. Monitor and maintain answering machine, on hold message facility and computer
 | 1. Immediate attention to visiting patient within 20 seconds. Welcoming attitude towards patients at all times
2. Prompt answering of phone within 3 rings
3. 100% compliance in agreed timelines
4. All non-attendees followed up within 8 working hours of appointment
5. 100% accuracy in advising charges
6. Appropriate information given and appropriate referrals made
7. 100% accurate message taking and delivery to recipients
8. Refreshments provided as appropriate
9. Answering and message machines checked daily for operation. Messages recorded and delivered to recipients before 9.00am daily
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| **2. Efficient sorting and** **distribution of incoming mail and timely dispatch of outgoing mail**  | 1. Collect, open and sort mail to ensure that the appropriate staff members deal with mail relating to their areas of responsibility
2. Collect and prepare outgoing mail and deliver to post office daily
3. Coordinate patient recalls
4. Arrange courier deliveries as required
 | 1. Mail sorted and distributed within 1 hour of delivery
2. 100% accurate preparation of outgoing mail and deliver to post office to ensure timely arrival at destination
3. Recall letters, emails, SMS, phone calls sent / made before Friday each week
4. Prompt call to courier for collection
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|   **3. Provide accurate and timely invoicing and money handling** | 1. Invoice patients for all consultations and optical appliance orders as soon as practical prior to ordering
2. Collect payment for consultations and optical appliances as services are delivered
3. Dispatch claims to Medicare at least each week
4. Contact clients on a regular weekly basis regarding orders that are ready for collection (and payment) but have not been collected
 | 1. 100% accurate invoicing completed on time
2. 100% accurate and prompt HICAPS processing, money counting or credit card processing. Debtor targets achieved.
3. 100% accurate and prompt weekly dispatch of Medicare claims
4. Collection targets met
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|  **4. Assist patients with** **selection of products to ensure needs are met and** **sales are maximised** | 1. Maintain a current knowledge of available products in frames, sunglasses, and accessories.
2. Advise and assist patients with selection of contact lenses appropriate for their needs and fashion preferences.
 | 1. Up-to-date knowledge of frames, sunglasses and accessories maintained
2. Patient needs identified and accurate and professional advice given.
3. Knowledge of preferred styles of frames to suit shape of face, age etc.
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|  **5. Maintain supplies of**  **stationery and information**  **materials** | 1. Advise when supplies of stationery (paper & envelopes etc) run low
2. Attend to bulk photocopying of office forms and brochures when supplies run low
 | 1. Stationery levels checked weekly and immediate ordering of stationery when levels are low
2. 100% availability of forms and brochures when required
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|  **6. Ensure excellent practice appearance** | 1. Assist other members of staff in every possible way to do their own job efficiently.
2. Wear the prescribed uniform on all working days and maintain own uniforms in good repair, clean and pressed.
3. Prepare orders for new items of uniforms for approval by Optometrist/Principal
4. Attend immediately to any areas of the practice that are untidy or require minor cleaning
 | 1. Assistance provided as directed or required
2. Uniforms worn at all times
3. Maintain uniforms as specified
4. Needs identified and approval obtained. Order placed within 5 working days of approval
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|  **7. Other responsibilities** | 1. Inform Optometrist/Principal of any matter where a patient was less that optimally satisfied with the service, money or time was wasted or a dispute has arisen with another staff member.
2. Advise Optometrist/Principal of any news heard outside the practice that may have a bearing on any aspect of the practice.
 | 1. Incidents reported and recorded in same working day as occurrence
2. Issues handled as per practice agreed standards
3. Accurate information conveyed in a timely manner to Optometrist/ Principal
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**Signature Date**