O-health

POSITION DESCRIPTION

A-team: Customer Service, Patient Access and Administration

ROLE PURPOSE

Create an exceptional O-health experience where people feel known, supported and can access the right care at the right time.

Deliver confident customer service, actively manage patient access and appointment capacity, and keep administration accurate and organised. Know our services, find solutions and follow through—helping patients remain engaged with appropriate care and contributing to an A-team that enjoys its work and takes pride in doing it well.

POSITION DETAILS

Position title: A-team: Customer Service, Patient Access & Administration
Reports to: Patient Access & Administration Manager
Location: Albury–Wodonga, on-site
Employment: As agreed in employment contract
Award classification: To be confirmed
Remuneration: As agreed in employment contract
Effective date: To be confirmed

WHAT SUCCESS LOOKS LIKE

- Patients feel welcomed, listened to and supported, with clear information and a clear next step.
- Team members confidently explain O-health's services and help patients book appropriate care.
- Enquiries and referrals are followed through into bookings where appropriate.
- Appointment books are actively managed, with avoidable gaps addressed and cancellations followed up promptly.
- Rescheduling supports continuity of care and the timing recommended by the treating clinician.
- Patient information, payments and settlements are accurate, with discrepancies identified and addressed promptly.
- Third-party requirements are understood and managed, with approvals, accounts and required clinical documentation followed through.

- Emails, tasks and allocated responsibilities are completed within agreed timeframes, with clear ownership and handovers.
- Team members find practical solutions, contribute improvements and seek support when needed.
- The A-team works together to create a positive, welcoming environment and maintain O-health's service and presentation standards.

These are ongoing expectations of the role. Individual development priorities and measurable targets will be agreed with the Patient Access & Administration Manager and reviewed regularly.

CORE RESPONSIBILITIES

1. Customer Service & Patient Experience

Create a welcoming, responsive experience that reflects O-health's standards and helps patients feel known and confident in their care.

- Welcome patients and visitors warmly, build relationships and use patients' names where known.
- Maintain a practical understanding of O-health's services, practitioners and booking pathways, and communicate these confidently.
- Listen to each person's needs, explain options clearly and help them take the appropriate next step.
- Anticipate needs and take the extra step to solve problems, following through so patients are not left chasing answers.
- Handle enquiries, concerns and difficult conversations calmly and respectfully, resolving matters within authority and seeking support when required.
- Use agreed communication approaches and scripts with judgement, adapting to the individual while maintaining consistent information and standards.

2. Patient Access, Continuity & Appointment Book Management

Actively manage bookings and appointment capacity to help patients access appropriate care and continue their recommended treatment plans.

- Convert appropriate enquiries and incoming referrals into bookings through confident, helpful conversations and timely follow-up.
- Book suitable appointment types, practitioners and timeframes using established pathways.
- Understand clinicians' treatment-plan recommendations and support patients to book at the recommended frequency and timing.
- Follow up cancellations and interrupted care, offering rescheduling close to the intended appointment timeframe wherever possible.
- Offer suitable alternatives when a preferred practitioner or time is unavailable, seeking clinical guidance where needed.

- Maintain and actively use the waitlist and short-notice processes.
- Review appointment books, identify avoidable gaps and take appropriate action to use available capacity effectively.
- Coordinate proposed booking changes with patients and clinicians, keeping information and booking notes clear and accurate.

3. Communications, Data & Financial Administration

Every A-team member is responsible for accurate administration and timely communication across reception, phones, email and assigned tasks.

- Monitor and action O-health emails, phone enquiries and internal requests within agreed timeframes.
- Record and maintain accurate patient details, checking and updating outdated information as required.
- Ensure appointment, billing and administrative records are complete, accurate and entered in the correct place.
- Process payments and claims correctly, using the appropriate payer and payment method.
- Complete assigned settlement reconciliation and reporting, identifying and addressing or escalating discrepancies promptly.
- Maintain clear task records and handovers, including outstanding actions, ownership and next steps.
- Protect patient information and handle records confidentially in accordance with O-health policies.
- Complete required daily, weekly and monthly administration work and promptly correct or report errors.

4. Third-party Processes & Coordination

Every A-team member is expected to understand and apply O-health's third-party payer systems and procedures, including managing complex administration matters and seeking support when required.

- Maintain working knowledge of relevant payer requirements, booking conditions, approvals, billing processes and documentation.
- Obtain and accurately record claim details, referrals, approvals and other required information.
- Confirm eligibility and approval status according to established procedures and communicate requirements clearly to patients.
- Process third-party billing and claims accurately and follow up payer queries or outstanding actions.
- Track approval periods, approved sessions and required documentation to support continuity of care.

- Notify clinicians when AHTRs, letters, reports or other clinical actions are required, and follow up outstanding items.
- Communicate with patients, insurers, case managers and clinicians to resolve issues and keep work moving.
- Escalate matters outside authority or where requirements remain unclear, providing relevant information and action already taken.

5. Allocated Administration Responsibilities

Each A-team member takes ownership of allocated administration responsibilities and develops the capability to support other areas when required. Allocation may change according to clinic needs.

These responsibilities include:

- **Outstanding accounts management:** Monitor unpaid accounts, complete follow-up, maintain accurate records and escalate unresolved matters according to procedure.
- **Gym billing and follow-up:** Maintain accurate gym billing records, process charges and follow up outstanding payments or billing issues.
- **Term-class billing:** Coordinate billing for term classes, maintain accurate records and follow up outstanding payments.
- **Stock management:** Monitor stock availability and flow, arrange routine and special orders, and follow orders through to completion while avoiding unnecessary waste.
- **Referral program administration:** Track referrals and arrange thank-you communications or items according to the program's procedures.

Ownership includes completing work within agreed timeframes, keeping records current, resolving issues and arranging a clear handover when absent.

6. Teamwork, Development & Improvement

Contribute to a capable, engaged A-team that works together, takes initiative and delivers consistent service.

- Take responsibility for your work, priorities and follow-through.
- Proactively identify problems, consider practical solutions and act within your authority.
- Suggest improvements to recurring issues, inefficient processes and the patient experience.
- Communicate clearly with colleagues and clinicians, sharing information needed to deliver coordinated care and administration.
- Support new A-team members with established processes, practical guidance and day-to-day questions when required.
- Participate in meetings, training, feedback and development, and apply learning in daily work.
- Maintain knowledge of services, systems, payer requirements and updated procedures.

- Be flexible in helping cover administration leave and adjusting duties or shifts within agreed availability.
- Adjust priorities during busy periods or reduced staffing, keeping patient needs and time-critical work moving, and communicate when other tasks need to be deferred or reassigned.
- Contribute to a fun, welcoming and respectful workplace where people support one another and take pride in their work.

7. Clinic Presentation & Facilities

Maintain a clean, organised, and welcoming clinic that reflects the quality of O-health's care.

- Complete assigned presentation, cleaning, linen, opening and closing responsibilities according to established procedures.
- Keep work areas organised and ready for patients and colleagues.
- Identify and promptly report maintenance, equipment, stock or safety issues, taking appropriate action within your role.
- Use supplies and resources responsibly.

AUTHORITY & ESCALATION

A-team members are expected to resolve routine patient-service, booking and administration matters independently within established policies, procedures and delegated authority.

Seek support when a matter requires additional expertise or a decision outside your authority. Escalate patient-safety concerns, privacy breaches, significant financial discrepancies, complaints and major service or facility disruptions promptly.

When escalating, provide the relevant facts, action already taken and a proposed next step where appropriate.

Clinical decisions remain with the treating clinician. Administration supports access and treatment-plan coordination using documented recommendations and clinician guidance.

KEY WORKING RELATIONSHIPS

- Patient Access & Administration Manager
- A-team colleagues
- Patients, families and carers
- Clinicians and exercise professionals
- Business Operations Manager and relevant O-health team members
- Referrers, insurers, case managers and other third-party contacts
- Suppliers and relevant contractors

PERFORMANCE FRAMEWORK

Performance will be assessed against the expectations outlined in “What Success Looks Like”, core responsibilities and allocated administration duties.

A small number of meaningful measures and development priorities will be agreed with the Patient Access & Administration Manager and reviewed regularly.

Assessment will consider accuracy, service quality, initiative, follow-through, teamwork and administration’s contribution to patient access, continuity of care and effective use of appointment capacity.

EXPERIENCE, QUALIFICATIONS & CAPABILITY

The successful team member should demonstrate:

- Strong customer-service skills and the ability to communicate confidently with a wide range of people.
- Accurate administration, attention to detail and confidence working with payments and financial information.
- Good organisation and the ability to prioritise competing demands in a busy environment.
- Practical problem-solving, initiative and reliable follow-through.
- Confidence learning and using booking, practice-management, payment and communication systems.
- The ability to remain calm under pressure and handle sensitive conversations respectfully.
- A collaborative approach and willingness to learn, support colleagues and respond to feedback.
- Sound judgement about when to act independently and when to seek support.

Experience in customer service, administration, healthcare or a busy service environment is desirable. Familiarity with PracSuite, Google Workspace, HICAPS/EFTPOS and third-party payer processes is advantageous.

THE O-HEALTH WAY

All O-health team members are expected to act consistently with our purpose:

Help people live longer, healthier, happier lives.

For the A-team, this means combining human connection with confident service, accuracy, initiative and accountability. Patients should feel known, welcomed and supported.

Our values guide how we work:

- **Trust:** Be reliable, protect confidentiality and do what you say you will do.

- **Together we thrive:** Support colleagues, share knowledge and contribute to a positive team.
- **Better is always possible:** Stay curious, find solutions and improve how we work.
- **Communication & Education:** Listen, explain clearly and keep people informed.
- **It's personal:** Recognise individual needs and take pride in making each interaction matter.

ACKNOWLEDGEMENT

By signing below, the employee acknowledges that they have read and understood the purpose, responsibilities, authority and performance expectations of the position.

Employee	**O-health**
Name: _____	Name: _____
Signature: _____	Signature: _____
Date: _____	Date: _____