1. POSITION IDENTIFICATION

<table>
<thead>
<tr>
<th>Department Name:</th>
<th>Health and Counselling Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Number(s):</td>
<td>119329</td>
</tr>
<tr>
<td>Current Position</td>
<td>Medical Office Assistant, grade 7</td>
</tr>
<tr>
<td>Classification:</td>
<td>Medical Office Assistant, grade 7</td>
</tr>
<tr>
<td>Department Position Title:</td>
<td>Medical Office Assistant</td>
</tr>
<tr>
<td>Evaluating Supervisor's Title:</td>
<td>Manager, Clinical Health Services</td>
</tr>
<tr>
<td>Date Completed:</td>
<td>December 18, 2017</td>
</tr>
</tbody>
</table>

Part 1 is being completed by:
☐ Employee
☒ Evaluating Supervisor

2. POSITION SUMMARY

A summary of the major functions of the position in three or four sentences.

Provides support services to clinical staff in Health and Counselling Services as a member of the Medical Office Assistant (MOA) team. Ensures that the front-line operation of Health and Counselling Services is maintained at a high level of effectiveness and efficiency, and assists with the provision of health and counselling services for patients and clients.

3. MAJOR FUNCTIONS

List the duties and responsibilities of the position in order of frequency (i.e., (D) Daily; (W) Weekly; (M) Monthly; (S) Semester)

Reception Functions:

1. Welcomes patients and clients to the Health & Counselling Services and ensures ready access to services. (D)
2. Screens patients and clients to quickly determine the nature of their visit, identify the urgency for care and assigns to the most appropriate care provider. Uses independent judgment to determine the appropriateness of exceptions to normal clinic flow and adjusts schedules as necessary. (D)
3. Initiates crisis intervention for individuals in distress and ensures that the patient/client sees a clinical staff member to address their concerns. (D)
4. Registers patients/clients and schedules appointments using an electronic health record system to determine the next available appointment time. Books appointments for patients/clients to see care providers including physicians, psychologists, counselors, mental health intake worker, specialists, nurses, physiotherapists and others as necessary. (D)
5. Operates a telephone, paging and intercom system, electronic mail applications and a fax machine. (D)
6. Answers the emergency telephone line and alerts the emergency response team to emergency calls. (D)
7. Maintains the daily health care provider on-duty roster by updating the roster with current information showing who is on duty and emergency call to ensure staff can identify the appropriate contact person in any given situation. (D)

Clerical Functions:

1. Scans patient/client medical reports (e.g. x-ray results, consult letters) into the electronic health records system. Using the electronic health record system, labels the scanned documents with patients name and subject title (e.g. Allergist Consult Letter) and assigns to appropriate health care provider. (D)
2. Arranges recall and follow-up of patients/clients as requested by care providers. This includes generating PAP recall and follow-up letters and or/phone calls. (D)
3. Ensures that medical insurance, student numbers, and other patient/client demographic information are correct, valid and current. Maintains the confidentiality of patient/client files, ensuring security at all times. Follows relevant regulations and guidelines such as MSP and Freedom of Information (FOI) when storing and archiving charts. (D)
4. Enters patient/client diagnostic and billing codes into the electronic health record system ensuring information is accurate. (D)
5. Screens calls for care providers. Provides general and specific information related to clinical services and community resources. (D)
6. Arranges follow-up appointments for patients/clients by booking treatment times in advance at the direction of the care provider. (D)
7. Receives, opens, sorts and distributes mail for the Health Clinic. Runs Medinet and Excelleris result list reports. (D)
8. Records, transcribes and word processes letters, reports, minutes of meetings and other confidential documents using knowledge of medical terminology and word processing applications. (A/R)
9. Processes patient/client medical/counselling reports in response to third party requests (i.e. WCB, ICBC, Motor Vehicle Branch, RCMP) by providing information according to established procedures and guidelines. Ensures that all information is complete and that inquiries are handled properly. (A/R)
10. Collects, records and issues receipts for the payment of invoices for office visits, immunizations, equipment loans, insurance forms, medical letters or photocopying of medical/counselling records in compliance with Medical Services Commission guidelines and the FOI act. Utilizes Interact to collect fees. (D)
11. Issues, records and tracks rental equipment issued to patients by maintaining and updating a database. Collects deposit and maintenance fee and reimburses deposit to patients upon the return of rental equipment. (W)
12. Participates in team, clinic and general meetings. Takes meeting minutes when requested by chair or Manager, Clinical Health Services. (M)
13. Monitors Health Services office equipment including photocopiers, computers, printers, fax machines, etc. and arranges for repairs. (M)
14. Maintains an inventory of front office labels, forms, and handouts and replenishes stock when necessary. (M)
15. Processes OPT birth control sales following Health & Counselling Services policies and procedures. (D)
16. Manually matches electronic results that have not been automatically matched to a health care provider &/or patient/client in the electronic health record system. Then process unmatched results (i.e. result not belonging to a Health and Counselling Services patient/client) by following the guidelines set by the Health & Counselling Services and the Ministry of Health. (D)
17. Maintains inventory and orders lab forms and specimen containers from Labs. (W)

Clinical Functions:

1. Coordinates corridor flow by ensuring a reasonable distribution of patients/clients among clinical staff. Prepares the patient for visit with the health care provider, this may include taking vital signs and organizing the exam room for specific procedures. Enters into the electronic health record system the reason for patient’s visit, and if taken, vital signs and other measurements (e.g. urinalysis). (D)
2. Assist physicians and nurses during examinations and treatments of patients (i.e. gynecological procedures, minor surgical procedures, suturing, wound care). (D)
3. At the request of a physician or nurse conducts clinical procedures such as obtaining urine specimens, performing urinalysis, urine pregnancy testing, ECGs, dressing changes, and peak flow meter testing. Clinical procedures, results and measurements are to be documented in patient’s electronic health record. (D)

4. Maintains a safe environment for patients/clients and HCS staff by adhering to established safety practices regarding blood, bodily fluids, sharps, infection control, etc. (D)

5. Assists with housekeeping and routine stocking and organizing of clinical examination rooms and specific clinical areas (i.e. cardiac room, surgical room, brochure holders). (D)

6. Cleans, disinfects and sterilizes instruments and equipment as per Health & Counselling Services procedures, autoclave manufacturer recommendations, and BCCDC requirements. (D)

7. Checks, cleans and stocks cupboards, trolleys and trays according to established guidelines and procedures. Clean exam rooms after each patient use following Health & Counselling procedures and the BCCDC guidelines. (D)

8. Arranges referrals to specialist appointments and specialized lab tests (abdominal x-ray, stress test, MRI, etc.) and instructs patients regarding necessary preparations for such appointments. Maintains the electronic health record system referral database and ensures referrals are completed in a timely manner, and if the appointment time frame is too long notifies referring provider. (D)

9. Records pharmacy requests for refills, conveys physician instructions and keeps patients informed regarding the status of such requests. (D)

10. Documents all interactions and procedures related to patient/client visits in the electronic health record system (i.e. history taking, vital signs, appointments, telephone calls, etc.). (D)

11. Maintains and ensures “task” database (task requiring clerical action) in the electronic health record are completed in a timely manner (e.g. call patient in regarding test result). (D)

Billing and Administration Functions:

1. Processes Release of Information (ROI) requests from lawyers, clinics, SFU clients and other third party. This includes reviewing ROI requests, communicating with clients to confirm scope of information disclosure, ensuring written client consents are in order, coordinating with providers, preparing cover letters, billing and sending out requested information in a timely and secured manner. Ensures compliance of Freedom of Information and Protection of Privacy Act and related SFU policies, guidelines and procedures. (D)

2. Bills guard.me insurance, and reconciles payments. (D)

3. Ensures timely pre-approval requests for referrals to specialists are sent to guard.me insurance for clients insured by guard.me plans. (D)

4. Sends out Appointment Reminders using Filemaker Appointment Reminder app. Collects statistics on numbers of reminders emails sent, number of invalid of email addresses and number of clients do not have email address. Adds a note in Profile EMR patient file to alert fixing email address for each invalid email address. (D)

5. Communicates with clients regarding medical insurance, eligibility and procedure, including Medical Services Plan (MSP), guard.me and StudentCare. (D)

6. Assists international students to apply for MSP (e.g setting up an appointment with the client, obtaining required documentations to support application, reviewing the information with clients and completing online application form). Provides information to clients having MSP coverage issues by reinstating medical coverage. (D)

4. MINOR FUNCTIONS

List duties and responsibilities that occur annually and periodically throughout the year.

1. Picks up clinic supplies from public health, youth clinics and other health care facilities and delivers these to the Health & Counselling Services. (AR)

2. Photocopies patient/client files for release to appropriate care providers, legal bodies or to individuals. Ensures that guidelines regarding the copying of patient/client charts are followed and that the appropriate clinical staff review and sign off the charts to be released. (AR)

3. Maintains and updates the electronic health record system’s external provider database as per clinical staff request or when need is identified. (AR)

4. Provides clerical coverage and relief reception at other areas of HCS when necessary. (AR)

5. Assists with the orientation of new or relief MOA staff. (AR)

6. Assists with Student Medical Office Assistant practicums. (AR)

7. Performs other duties and responsibilities consistent with the job description and position title upon request. (AR)
### 5. LEVEL OF INDEPENDENCE
Check one box that best describes the level of independence that can be exercised within the position by a fully trained employee.

- **a)** Work is provided with specific instructions describing how and when it should be completed.
- **b)** Work is provided with general instructions. The employee makes choices about how the work will be completed within deadlines.
- **c)** Work is self-directed by the employee. The employee determines what work needs to be completed and when it should be completed to meet deadlines.
- **d)** Work is assigned on a project-by-project basis in the form of broad objectives. The employee evaluates what work needs to be completed within general time frames. Provide examples of project work:

### 6. TRAINING EXERCISED
If the position provides training, check each description that applies.

- **a)** Not required to provide training to other individuals.
- **b)** Explains how work is performed in his/her own position to individuals in other positions performing the same or similar work (includes training replacement employees).
- **c)** Provides one-on-one specialized training to other individuals. Considered a specialist in a particular area or field of study. Positions at this level may be designated as the resident department expert.
- **d)** Provides one-on-one training to individuals in other positions. Must have a good understanding of the work of the other positions. Positions at this level may be designated as group leaders or work leaders.
- **e)** Conducts training seminars for groups. Training seminars are normally scheduled and follow a prescribed format. May also develop or assist in the development of training seminars.

### 7. DIRECTION EXERCISED
Check each description that applies.

- **a)** Not required to provide direction to other individuals.
- **b)** Assigns and/or checks work of other individuals.
- **c)** Schedules, assigns, and checks work of other individuals.
- **d)** In addition to C, establishes work priorities for a unit.
- **e)** In addition to C and D, guides project teams.
8. INTERNAL AND EXTERNAL CONTACTS
List internal and external contacts (i.e., specific positions within own department, other departments, students, faculty, on/off campus vendors, etc.), the duration of each contact (i.e. less than 1 hour at a time, 1-2 hours at a time, more than 2 hours at a time), and the frequency of each contact (i.e. occasional, frequent, or continuous).

<table>
<thead>
<tr>
<th>Type of Contact</th>
<th>Duration</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>SFU Student Patients and Clients</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>SFU Faculty and Staff Patients</td>
<td>&lt; 1 hour</td>
<td>occasional</td>
</tr>
<tr>
<td>HCS Associate Director, Counselling</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>HCS Manager, Clinical Health Services</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>HCS Physicians</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>HCS Mental Health Intake Counsellor</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>HCS Nursing Staff</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>HCS Counsellors and Psychologists</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>HCS Chiropractor</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>HCS Specialist (e.g. Allergist, Psychiatrist)</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>HCS Director and Admin Staff</td>
<td>&lt; 1 hour</td>
<td>occasional</td>
</tr>
<tr>
<td>Community Physicians/ Specialists Offices X-Ray Offices</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>Medical Laboratories</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>Pharmacies</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>Hospitals and Outpatient Services</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>BC Cancer Agency</td>
<td>&lt; 1 hour</td>
<td>occasional</td>
</tr>
<tr>
<td>WCB/ICBC</td>
<td>&lt; 1 hour</td>
<td>occasional</td>
</tr>
<tr>
<td>Massage/Physiotherapy Offices</td>
<td>&lt; 1 hour</td>
<td>occasional</td>
</tr>
<tr>
<td>Pharmaceutical Representatives</td>
<td>&lt; 1 hour</td>
<td>occasional</td>
</tr>
<tr>
<td>SFU Departments/Committees</td>
<td>&lt; 1 hour</td>
<td>occasional</td>
</tr>
<tr>
<td>Campus Security</td>
<td>&lt; 1 hour</td>
<td>occasional</td>
</tr>
<tr>
<td>Ambulance Services</td>
<td>&lt; 1 hour</td>
<td>occasional</td>
</tr>
</tbody>
</table>

9. IMPACT OF ERRORS
Common Errors: Provide a few examples of the most common errors which normally occur in the performance of the work.

- Scanning a patient’s document into the wrong patient’s electronic health record.
- Disconnecting or losing a phone call.
- Forwarding a caller (phone call) to the wrong person.
- Booking or scheduling error (e.g. booking patient on the wrong day or with the wrong health care provider).

Uncommon Errors: Provide a few examples of most uncommon errors which infrequently occur in the performance of the work.

- Forgetting to page "ER team to the front reception" for an emergency.
- Handing out the wrong birth control product during the payment transaction.
- Generating an invoice under the wrong patient’s name.
9. IMPACT OF ERRORS
Common Errors: Provide a few examples of the most common errors which normally occur in the performance of the work.

- Forgetting to “arrive” patient (check patient in) when patient has arrived for his/her appointment.

10. EFFORT
Describe concentrated periods of auditory (hearing/listening); visual (seeing); perceptual (understanding / comprehending); and physical dexterity (finger/hand movements, eye/hand coordination, lifting, carrying, pushing, pulling, reaching etc.). For each example of effort, indicate the concentrated duration (less than 1 hour at a time, 1-2 hours at a time, more than 2 hours at a time) and frequency (occasional, frequent, continuous).

<table>
<thead>
<tr>
<th>Type of Effort</th>
<th>Duration</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sensory</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Auditory – Taking telephone messages regarding lab reports, x-ray reports, patient inquiries, etc.</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>Visual – Coding on charts Working on computers Laboratory tests</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>Perceptual – Understanding verbal and written information Determining procedures and set ups for exams</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>Reading and Writing – Reading written instructions and writing in electronic health records</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>Mobility – Walking, standing, bending, crouching, twisting</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>Physical Dexterity – Lifting, carrying, pushing, supporting patients fine finger movements (word processing, dressings) and reaching</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>Precise minute taking</td>
<td>&lt; 1 hour</td>
<td>occasional</td>
</tr>
</tbody>
</table>

11. WORKING CONDITIONS
a) Describe the place(s) where work is performed such as office environment, laboratory, outside work site, etc. Also identify the number of hours (of the total hours worked per week) spent in the place(s).

<table>
<thead>
<tr>
<th>Location</th>
<th>Hours spent as a total of hours worked per week</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health and Counselling Reception Desk And Treatment Areas (corridors/exam rooms)</td>
<td>35 / 35</td>
</tr>
</tbody>
</table>

b) Describe any uncomfortable and/or distracting conditions in the work place(s) which an incumbent is exposed to on a regular basis and the frequency of the exposure. (e.g. interruptions, distracting noise, unpleasant odours, dust, drafts, inks, dyes, cleaning agents, toner for printers, temperature extremes, heavy dust conditions, wetness, fumes, vibrations, etc.)

<table>
<thead>
<tr>
<th>Uncomfortable Conditions</th>
<th>Frequency of Exposure (Occasional, Frequent, or Continuous)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standing / walking</td>
<td>frequent</td>
</tr>
</tbody>
</table>
11. WORKING CONDITIONS

<table>
<thead>
<tr>
<th>Potential Health or Safety Hazards</th>
<th>Frequency of Exposure (Occasional, Frequent, or Continuous)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exposure to contagious illnesses</td>
<td>frequent</td>
</tr>
<tr>
<td>Exposure to urine/swab/Pap slides (specimens)</td>
<td>frequent</td>
</tr>
<tr>
<td>Exposure to open wounds</td>
<td>frequent</td>
</tr>
<tr>
<td>Exposure to verbal abuse or threatening behaviour from patients/clients</td>
<td>occasional</td>
</tr>
</tbody>
</table>

c) Describe any potential health or safety hazards etc. and the frequency of exposure of each hazard. (e.g. dealing with complaints and/or verbal/physical abuse; noise levels that interfere with normal speech/hearing; toxic gases or materials; dangerous chemicals, combustibles, radioactive material; repetitive arm, finger, wrist movements or other activities that may result in a physical injury; high speed, pressurized equipment; high voltage; heights above five feet; bio-hazardous wastes, body fluids, etc.)

12. CONTINUING EDUCATION

Check each description that applies.

- [ ] a) Does not require any continuing education.
- [x] b) Requires learning new university/department related procedures and/or methods.
- [x] c) Requires learning new procedures and/or methods acquired through reading non-university/department publications.
- [ ] d) In addition to B and C, requires registration in formal seminars, training sessions, workshops, conferences, etc.
- [ ] e) In addition to B, C, and D, requires registration in post-secondary courses (one semester/equivalent).

13. QUALIFICATIONS

Minimum required to satisfactorily perform the work.

Formal education qualifications: identify the highest level of formal schooling required.

High school graduation and one year of post-secondary education or formal equivalent (e.g., Medical Office Assistant Program) which includes word processing, electronic health record system training, database and spreadsheet courses.

In addition to formal education, identify the certification or program of study required.

Medical Office Assistant Certificate

In addition to the above qualifications, the number of years of minimum experience are:

2 Years
13. QUALIFICATIONS
Minimum required to satisfactorily perform the work.

Check one:

☐ An equivalent combination of formal education, certificate/program of study and experience is acceptable.
☐ An equivalent combination of education, certificate/program of study and experience is not acceptable because: (please explain)

Occupational Skills: Identify skills specifically required to perform the work of the position.

- 50 wpm keyboarding skills with a high degree of accuracy.
- Good knowledge of medical office practices, methods, paper charts, and electronic health record maintenance, diagnostic and fee codes, and human anatomy, medical, and pharmacology terminology.
- Good knowledge of standard medical diagnostic and treatment equipment and instruments, including sterilization methods and practices.
- Good knowledge of initial screening and prioritizing urgency of patient/client care.
- Good knowledge of infection control (e.g., cleaning equipment, cleaning exam rooms between use, good hand washing technique, etc.).
- Good knowledge of standard patient charting methods.
- Good knowledge of current Medical Services Plan (MSP) billing codes and procedures and Worker's Compensation Board (WCB) guidelines.
- Excellent customer relations skills.
- Excellent organizational skills.
- Excellent interpersonal and communication (oral and written) skills.
- Good analytical reasoning skills.
- Ability to use word processing and database applications, electronic health record systems (e.g. scheduling, clinical, and billing components such as Intrahalth’s Profile System) and Excelleris and Medinet electronic results system, at an intermediate level.
- Ability to perform routine medical procedures (i.e., taking vital signs, urinalysis, ECGs, urine pregnancy testing, dressing changes, and peak flow meter testing).
- Ability to work independently and within a team environment.
- Ability to perform arithmetic calculations with a high degree of accuracy.
- Ability to record and transcribe minutes of meetings.
- Ability to exercise mature judgment and initiative.
- Ability to handle sensitive and confidential information with discretion.
- Ability to work effectively and efficiently in a fast paced busy health clinic.

Occupational Requirement(s):
Identify non-skill requirements to perform the work such as ability to work shifts and/or be on-call; ability to travel periodically outside the lower mainland; have a valid driver's license; ability to lift, move, or carry equipment or materials over 10 kg; etc.

- Ability to assist another person and/or use aids to assist with lifting, moving, or carrying equipment and/or patients up to 25 kg, following basic occupational safety standards and guidelines.
- Ability to provide coverage at other HCS sites (SFU Vancouver, SFU Surrey, SFU Burnaby).
- Ability to work flexible shifts.