

LINGWELL CROFT SURGERY

Job Description

Operations & Finance Manager

IMMEDIATE SUPERVISOR:	Managing Partner
RESPONSIBLE TO:	Managing Partner
PAY SCALE:	£26,000.00- £28,000.00 (Dependant on experience)

Job Summary

The Operations Manager will work closely with and deputise for the Managing Partner. They will take responsibility for all aspects of management and play an integral part in the operational development of the Practice, allowing the Managing Partner to focus on strategic management. They will work, under the instruction of the Practice Manager to whom they will report on progress, on the creation, update and efficient implementation of policies and procedures and ensure the practice is up to date with current regulatory bodies and NHS requirements. They will be the Practice IT and Systems Lead to ensure efficient use of and proactive development of available system resources. They will also be the lead for Health & Safety including Fire Safety.

Reporting Line

The Job Holder reports directly to the Managing Partner. The job holder will cover for the Managing Partner and attend meetings in place of when required.

MAIN DUTIES AND RESPONSIBILITIES:

Strategic Management

- Help develop the practice as a business and proactively seek opportunities to develop services locally through Federations / PCN's / CCG's and other bodies.
- To proactively seek out innovative and efficient ways of working to ensure the future success of the practice.
- Ensure the practice works collaboratively with other local practices to redesign and deliver services for the benefit of patients and the practices involved.
- Evaluate performance against objectives / budgets. Report and address shortfalls.
- Prepare robust business cases for planned new developments ensuring any tender documentation complies with required criteria.
- Help seek out funding opportunities to optimise income.
- Seek out marketing opportunities to promote practice to local community and other medical services.

Human Resources (HR)

- Ensure Education and Training for ALL staff clinical and non-clinical is delivered consistently to ensure practice and self development in line with practice needs.
- Ensure Employment Law is followed in all policies and procedures.
- Assist with carrying out recruitment and induction – adverts, interviews, issuing staff contracts and up to date job descriptions / personal specifications. Delegating where appropriate to Team Leaders.
- Check that staff maintain their required registrations to comply with their role e.g. performers list for GP's, NMC for nurses etc.
- Carry out appraisals for staff who directly report to the Operations Manager annually and performance manage on an ongoing basis. Ensure that appraisals are also undertaken annually within team(s) and performance management is in place.
- Assist with the management of staff budgets – salaries, pensions, tax and benefits.
- Monitor staff absences, proactively manage accordingly and report as required to the Managing Partner.
- Regularly review staff morale and plan periodic “team” events to ensure opportunity for team building and working across teams.
- Generate and maintain succession planning for any staff member anticipated to retire and ensure adequate resources in each area to provide cover at all times.

Finance

- Assist as required with the management of all aspects of finance for the practice.
- Process the financial claims for all work done in the practice for the required timescales, including the PPA. Delegate if or where appropriate maintaining responsibility.
- Ensure all fees and payments due are received in the timescales expected. Report anomalies to Managing Partner.
- Responsible for invoicing and ensuring payments received for medical reports to Insurance companies, solicitors etc. Ensure documents are sent securely using IGPR software and other secure means.
- Maximise income by cost control, reviewing processes and procedures and seeking new initiatives.
- Manage in conjunction with the Managing Partner payroll including salaries, PAYE and pensions.
- Manage Incentive schemes including QOF and QIS, responsible for running searches and submitting claims. Ensure the practice meets and exceeds its targets.
- Work closely with the Managing Partner on financial forecasting and planning to ensure cash flow and report regularly to partners.
- Maintain accurate records at all times and provide to the accountants and HMRC when required.
- Ensure payments are all made in accordance with agreed / required timescales.
- Share in the responsibility for financial security and ensure access to transactions are limited to accountable staff only with the Managing Partner.
- Help manage the use of Petty Cash and the storage of cash on the premises.
- Monitor card payments made to the practice to ensure process is efficient and fit for purpose.

Premises

- Assist with the management of the premises and help monitor and maintain all appropriate maintenance and cleaning contracts.

- Manage H&S and Fire Risks of the premises and grounds. Carry out quarterly H&S inspections of the premises and address any issues promptly with the support of the Managing Partner. Keep all staff up to date with their responsibilities, ensuring adequate training is undertaken.
- Carry out a minimum of an annual fire evacuation drill.
- Constantly review security of the practice and ensure policies are followed at all times. Feedback to Managing Partner
- Constantly review the use of the premises with a view to optimising use and increasing income. Feedback to Managing Partner
- Identify and present business plans for any change in use or potential development of the premises as required by Managing Partner.

IT

- Day to day management of all IT systems and software used in the practice. Monitor to ensure usage is in line with practice policies and compliant with legal requirements and national guidelines.
- Run patient data audits as required and maintain records for follow up reviews; liaise closely with doctors and nursing team to ensure quality of care is achieved and targets met.
- Manage access to systems to ensure it is only accessed by authorised users and access is at an appropriate level.
- Liaise with suppliers and user groups to maximise potential and ensure fully updated in conjunction with the Managing Partner.
- Manage the practice website and all other appropriate social media including NHS Choices.
- Manage shared folders and ensure back up and contingency plans in place.
- Operational management of the implementation of new systems. Ensure they are fully documented and users fully aware how to use them.
- Operational management of the use and maintenance of the clinical system to ensure data entry complies with nationally and locally agreed protocols.
- Ensure users are all fully trained in the use of all systems available to them and assist in the development of templates and other tools. Seek support from Data Quality and other third parties who may be available to assist.

Day to Day

- Take responsibility for making sure periodic returns are undertaken. Ensure practice is compliant with all regulatory requirements e.g. CQC, IG, Workforce etc.
- Manage policies and protocols to ensure all staff clinical and non-clinical have access to up to date guidance to facilitate their role. Carry out audits from time to time to measure performance and feedback to the practice as appropriate.
- Ensure management information is provided on routine activities regularly for review / audit e.g. phone answering, DNA's, referrals etc.
- Set and review standards expected and ensure they are implemented across the practice – ensure quality at all times.
- Carry out projects identified. Report on and manage their progress to conclusion as directed by the Managing Partner.

- Help ensure provisions are sourced economically and are suitable for the efficient running of the practice – medical supplies, vaccines, stationery and domestic supplies.
- First line management of all complaints – ensuring they are fully investigated and responded to in line with the complaints protocol. Escalate as appropriate. Monitor and report on any trends or concerns.
- Manage the use of the building by third parties and negotiate contracts ensuring this is not to the detriment of the practice's day to day business and income is maximised in conjunction with the Managing Partner.
- Facilitate, encourage and support the Patient Participation Group.
- Oversee the presentation of the practice – ensure premises and grounds are welcoming and presentable and display materials are neat, clean and in date.
- Ensure alerts and notifications received by the practice are shared with appropriate staff (clinical / non clinical) as required.
- Maintains the practice contingency plan and ensures that all staff are kept up to date with contact details to use in an emergency.
- Seek feedback from patients through survey's and group meetings to support the development of the practice in line with patient needs as directed by the Managing Partner

Confidentiality:

- In the course of seeking treatment, patients entrust us with, or allow us to gather, sensitive information in relation to their health and other matters. They do so in confidence and have the right to expect that staff will respect their privacy and act appropriately
- In the performance of the duties outlined in this job description, the post-holder may have access to confidential information relating to patients and their carers, practice staff and other health care workers. They may also have access to information relating to the practice as a business organisation. All such information from any source is to be regarded as strictly confidential
- Information relating to patients, carers, colleagues, other health care workers or the business of the practice may only be divulged to authorised persons in accordance with the practice policies and procedures relating to confidentiality and the protection of personal and sensitive data

Health & Safety:

The post-holder will assist in promoting and maintaining their own and others' health, safety and security as defined in the practice health & safety policy, to include:

- Using personal security systems within the work place according to practice guidelines
- Identifying the risks involved in work activities and undertaking such activities in a way that manages those risks
- Making effective use of training to update knowledge and skills
- Using appropriate infection control procedures, maintaining work areas in a tidy and safe way and free from hazards
- Reporting potential risks identified

Equality and Diversity:

The post-holder will support the equality, diversity and rights of patients, carers and colleagues, to include:

- Acting in a way that recognises the importance of people's rights, interpreting them in a way that is consistent with practice procedures and policies and current legislation
- Respecting the privacy, dignity, needs and beliefs of patients, carers and colleagues
- Behaving in a manner which is welcoming to and of the individual, is non-judgmental and respects their circumstances, feelings priorities and rights.

Personal/Professional Development:

The post-holder will participate in any training programme implemented by the practice as part of this employment, such training to include:

- Participation in an annual individual performance review, including taking responsibility for maintaining a record of own personal and/or professional development
- Taking responsibility for own development, learning and performance and demonstrating skills and activities to others who are undertaking similar work

Quality:

The post-holder will strive to maintain quality within the practice and will:

- Alert other team members to issues of quality and risk
- Assess own performance and take accountability for own actions, either directly or under supervision
- Contribute to the effectiveness of the team by reflecting on own and team activities and making suggestions on ways to improve and enhance the team's performance
- Work effectively with individuals in other agencies to meet patient's needs
- Effectively manage own time, workload and resources

Communication:

The post-holder should recognize the importance of effective communication within the team and will strive to:

- Communicate effectively with other team members
- Communicate effectively with patients and carers
- Recognize people's needs for alternative methods of communication and respond accordingly

