
All District Health Boards

NATIONAL HEALTH ADMINISTRATION AND CLERICAL EMPLOYEES EMPLOYED IN DHBs PAY EQUITY SETTLEMENT AGREEMENT

2022



Pay Equity Settlement Agreement

Introduction

1. This Pay Equity Settlement Agreement (“Settlement Agreement”) is a pay equity claim settlement for the purposes of the Equal Pay Act 1972 (“the Act”). It records the agreement reached between:

- a) the Chief Executives of the twenty District Health Boards (“DHBs”); and
- b) the New Zealand Public Service Association Te Pukenga Here Tari Mahi (“PSA”)

(together, “the parties”)

to settle the pay equity, claim for Administration and Clerical employees employed in DHBs in administration and clerical roles which are able to be mapped to a National Role Profile^{1,2}

- 2. This settlement agreement will continue to apply to successor entities.
- 3. As a consequence of being covered by this Settlement Agreement, the Collective or Individual Employment Agreement of every settlement employee is automatically varied in accordance with section 13ZM of the Act.

Background

- 4. On 18 April 2018, the PSA raised a pay equity claim for Administration and Clerical members employed in DHBs with the Chief Executives of the 20 DHBs (the “Pay Equity Claim”).
- 5. On 27 July 2018, the parties agreed to engage in a process to assess and resolve the Pay Equity Claim.
- 6. On 15 February 2019, the DHB / PSA bi-partite working group (“the Working Group”) was established and the DHBs/PSA clerical and administration pay equity bargaining Terms of Reference was agreed and recorded to systematically assess and resolve the pay equity claim.
- 7. The parties used the gender-neutral Pay Equity Assessment Tool (PEAT) to assess the work of the claimant and comparator groups. This was carried out by a bi-partite work assessment committee and overseen by a bi-partite quality review team.
- 8. The comparator occupations listed below were used to assess and resolve the Pay Equity Claim.

¹ Refer to Schedule 1 which sets out the list of National Role Profiles and to the detailed role profiles in Appendix 1.

² As part of undertaking the assessment process the parties determined Librarians and Interpreters do not perform the same or substantially similar work to the other roles covered by the claim. The parties therefore agreed that Librarian and Interpreter roles are outside the scope of the claim; and they would progress a separate pay equity claim for those roles.

Comparator Groups
Fishery Officer
Customs Officer
Corrections Officer
Mechanical Engineer

9. On 22 December 2021, following negotiation, the parties signed an Agreement in Principle to settle the Pay Equity Claim and offer this Settlement Agreement to proposed settlement employees for consideration and ratification. Proposed settlement employees are those affected employees who have not opted-out of the claim.

Agreed terms of settlement

10. The parties have agreed that the Pay Equity Claim is settled and that the remuneration provided for in this Settlement Agreement does not differentiate on the basis of sex in the manner set out in section 2AAC(b) of the Act and resolves any historical undervaluation.

11. **Purpose and application of this Settlement Agreement**

11.1 The purpose of this Settlement Agreement is to:

- (a) settle the Pay Equity Claim and record the agreed outcome of settlement negotiations in writing to fulfil the requirements of sections 2AAC(b) and 13ZH(3) of the Act; and
- (b) record the process for reviewing and maintaining pay equity for employees covered by the Settlement Agreement; and
- (c) detail the frequency of those reviews; and
- (d) include a summary of the method used to assess the Pay Equity Claim and a description of the comparators that were used by the parties; and
- (e) provide certainty for the parties that this Settlement Agreement is a full and final settlement of all matters relating to the Pay Equity Claim from the date this Settlement Agreement comes into force (section 13ZH of the Act).

11.2 The Settlement Agreement applies to employees who are covered by the Pay Equity Claim in accordance with section 13W of the Act and who have not opted out of the claim under section 13Y of the Act.

11.3 Additionally, all employees employed by the 20 DHBs who were not covered by the Pay Equity Claim, but who perform the same, or substantially similar work as the work to which the settlement relates, and who are not barred from raising their own claim under the Act, will be offered the full benefit of this Settlement Agreement, in accordance with section 13ZL of the Act.

12. Remuneration

- 12.1 The parties have reached agreement on remuneration that does not differentiate on the basis of sex in the manner set out in section 2AAC(b) of the Act for employees covered by the Pay Equity claim.
- 12.2 Due to the high level of variability of pay rates and pay frameworks that apply to employees covered by the Pay Equity Claim across 20 DHBs, the parties agreed that a national pay rate, job banding and pay step structure is required to address the Pay Equity Claim. A national pay rate, job banding and pay step structure provided the means to address the Pay Equity Claim by bringing individually variable rates of pay up to national pay rates that address the undervaluation for the roles covered by the Pay Equity Claim.
- 12.3 The parties agree that the rates of remuneration for settlement employees do not differentiate between male and female employees in the manner set out in section 2AAC(b) of the Act³.
- 12.4 The detail of the national pay rate, job banding and pay step structure referred to above is set out in the following schedules:
- Schedule 1: National Health Administration and Clerical Role Profiles and Job Banding Structure
 - Schedule 2: Pay Rates and Pay Structure Rules
 - Schedule 3: Clinical Coder Pay Rates and Pay Structure Rules

Translation to new remuneration

- 12.5 The basis for translating the existing pay rates of employees covered by the Settlement Agreement and those who are offered and accept the benefit of the settlement, to the rates of remuneration in this Settlement Agreement is based on two factors:⁴
- The National Role Profile that the employee's role has been mapped to; and
 - The employee's time in role.

Schedule 4 sets out the detail on the translation and appeal process for employees to transition to the national pay rate and job banding structure.

Interim pay equity adjustment

- 12.6 The Terms of Agreement of 27 November 2020, agreed by the parties as an interim step towards a pay equity settlement, provided for employees covered by the Pay Equity Claim to receive a maximum flat dollar adjustment of up to \$2500 to base salaries effective 30th November 2020.

³ The rates of remuneration agreed between the parties are set out in Schedules 2 and 3.

⁴ The basis for translation is set out in Schedule 4.

- 12.7 Employees who were not mapped at that time to a National Role Profile and, as a result, did not receive the interim adjustment, will receive the interim adjustment as part of this settlement, applied in accordance with the Terms of Agreement and effective from 30th November 2020.
- 12.8 Employees who were mapped incorrectly at the time the interim adjustment was applied will receive any adjustment required as part of this settlement, effective from 30th November 2020.

Payment to recognise delay in settling

- 12.9 The parties have agreed the payment of a lump sum to acknowledge the delay in reaching settlement since the date of the interim pay adjustment of 30th November 2020.

The payment will be a lump sum payment of \$2,500 which will be pro-rated by:

- FTE or hours worked whichever is the higher; and
 - Service for those employed at DHBs for less than thirteen months (over the period 1 December 2020 to 1 January 2022).
- 12.10 The payment is payable to employees covered by the settlement agreement and those who are offered and accept the benefit of the settlement;
- who were employed by a DHB in the period 1 December 2020 to 1 January 2022 and;
 - were still employed at the date of signing the Agreement in Principle (22 December 2021).

Effective date of settlement

- 12.11 This Settlement Agreement will come into effect on 1 January 2022.

Review⁵

13. Maintaining Pay Equity

- 13.1 Section 13ZH(3)(b)(viii) of the Act requires a process for reviewing the remuneration to ensure that pay equity is maintained.
- 13.2 The parties have agreed that the remuneration set out in this Settlement Agreement will be reviewed to ensure that pay equity is maintained.

⁵ The parties acknowledged in the Agreement in Principle that PSA / DHB bargaining to replace expired and expiring collective agreements in early 2022 will be the first opportunity for the parties to implement a review to maintain pay equity.

- 13.3 A joint union/employer Remuneration Forum will consider the context within which pay equity is being maintained and a range of available information including but not limited to trends in changes to the remuneration of the core comparator workforces, trends in changes in the Labour Cost Index and Consumer Price Index, Treasury forecasts and any other information as may be agreed by the parties.
- 13.4 The parties agree that the Remuneration Forum will occur in alignment with the collective bargaining cycle.
- 13.5 The review process set out in this clause may change, by agreement, following the release of Te Kawa Mataaho Public Service Commission's final system wide guidance around reviews.

Union mandate

14. The PSA confirms that it has the mandate to sign this Settlement Agreement on behalf of employees covered by the Pay Equity Claim pursuant to section 13ZF(5) of the Act

Good Faith

15. The parties will deal with each other in good faith on all matters under, or associated with, this Settlement Agreement in accordance with section 13C of the Act.

Costs

16. The parties agree to bear their own costs of negotiating and entering into this Settlement Agreement.

Counterparts and entire agreement


17. This Settlement Agreement may be executed in counterparts, each of which shall be deemed to be an original, but all of which, taken together, shall constitute one and the same agreement.
18. This Settlement Agreement is made up of all of its parts including schedules and appendices, and supersedes and extinguishes all previous drafts, agreements, arrangements, and understandings between the parties.

Legal advice


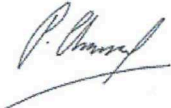
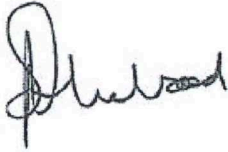
19. The parties agree they have had the opportunity to seek independent legal advice on the meaning and effect of this Settlement Agreement.

Signatories

AUTHORISED Representative of the New Zealand Public Service Association



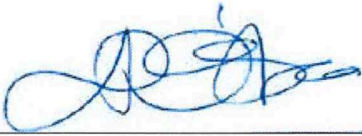


		
Kerry Davies PSA National Secretary New Zealand Public Service Association		Dated 7/06/2022

AUTHORISED Representatives of the EMPLOYER PARTIES (the DHBs):

		03/06/2022
Jim Green Chief Executive Tairāwhiti District Health Board		Dated
		27/05/2022
Pete Chandler Chief Executive Bay of Plenty District Health Board		Dated
		24/05/2022
Nick Saville-Wood Chief Executive Lakes District Health Board		Dated

		25/05/2022
Keriana Brooking Chief Executive Officer Hawke's Bay District Health Board		Dated
		25/05/2022
Nick Chamberlain Chief Executive Officer Northland District Health Board		Dated
		25/05/2022
Dale Bramley Chief Executive Officer Waitemata District Health Board		Dated
		24/05/2022
Ailsa Claire Chief Executive Officer Auckland District Health Board		Dated
		24/05/2022
Peter Watson (Dr) Acting Chief Executive Officer Counties-Manukau District Health Board		Dated

		30/05/2022
Kevin Snee Chief Executive Officer Waikato District Health Board		Dated
		26/05/2022
Gillian Campbell Acting Chief Executive Officer Taranaki District Health Board		Dated
		30/05/2022
Russell Simpson Chief Executive Officer Whanganui District Health Board		Dated
		24/05/2022
Kathryn Cook Chief Executive Officer MidCentral District Health Board		Dated
		24/05/2022
Fionnagh Dougan Chief Executive Officer Capital & Coast District Health Board		Dated

		<p>24/05/2022</p>
<p>Fionnagh Dougan Chief Executive Officer Hutt Valley District Health Board</p>		<p>Dated</p>
		
<p>Dale Oliff Chief Executive Officer Wairarapa District Health Board</p>		<p>Dated 7/06/2022</p>
		<p>26/05/2022</p>
<p>Lexie O'Shea (Interim) Chief Executive Officer Nelson/Marlborough District Health Board</p>		<p>Dated</p>
		<p>24/05/2022</p>
<p>Peter Bramley Chief Executive Officer Canterbury District Health Board</p>		<p>Dated</p>
		<p>24/05/2022</p>
<p>Peter Bramley Chief Executive Officer West Coast District Health Board</p>		<p>Dated</p>

		24/05/2022
Jason Power (Interim) Chief Executive Officer South Canterbury District Health Board		Dated
		26/05/2022
Chris Fleming Chief Executive Officer Southern District Health Board		Dated

Schedule 1: National Health Administration and Clerical Role Profiles and Job Banding Structure

National Job Banding Structure

1. The Terms of Agreement concluded between the parties on 27 November 2020 included agreement to a 7-level job banding structure with roles placed in the bands based on the scoring that had been carried out as part of the pay equity work assessment process, using the gender-neutral Pay Equity Work Assessment Tool⁶.
2. The joint DHB / PSA work programme agreed as part of the Terms of Agreement included the following:
 - The development of national role profiles to cover the work covered by the claim.
 - Mapping of the work covered by the claim to the national role profiles.
3. The outcome of the mapping is a total of 19 national role profiles to cover the Administration and Clerical work covered by the pay equity claim.

National Role Profiles and Bands

4. The National Health Administration and Clerical Role Profiles were developed to reflect the range of administration and clerical roles found in District Health Boards and to support the implementation of the pay equity settlement for Administration and Clerical employees employed in DHBs
5. The purpose was to standardise pay rates for roles of like value within and across DHBs. The role profiles were informed by the work of establishing undervaluation and assessment of work using a gender-neutral tool.
6. Role profiles have been developed to cover the range of work covered by the claim.
7. The purpose is not to replace existing job descriptions or job titles at the local level, but to ensure that there is a national set of role profiles that individual roles are able to be mapped to for the purposes of the national pay rate and job banding structure.
8. It is important to note that it is the work carried out and not an employee's job title that determines the National Role Profile that the role is mapped to.

⁶ The Pay Equity Work Assessment Tool was developed by Te Kawa Mataaho Public Service Commission to assist the parties to pay equity claims.

9. The National Role Profiles⁷ are set out below:

CLERICAL AND ADMINISTRATIVE NATIONAL ROLE PROFILES	
PROFILE 7:	Functional Leadership or Line Management Leadership of an administration specialist function.
PROFILE 6B:	Specialist or Technical Leadership/Supervision of an administrative function.
PROFILE 6D:	Analyse, advise and/or resolve complex problems for finance, procurement and/or payroll.
PROFILE 5A:	Managing the rostering of staff for service(s)/division(s).
PROFILE 5B:	Managing a waitlist, schedule template and processes for a clinical service(s).
PROFILE 5C:	Provide active, day-to-day administrative coordination across functions to an individual(s), service or programme of work.
PROFILE 5D:	Providing and coordinating access to information internally and/or externally.
PROFILE 4A:	Providing a range of administration services to an individual, service or department or project.
PROFILE 3A:	Inputs and processes information, completing routine payroll transactions in accordance with procedures.
PROFILE 3B:	Transcription of medical information (outpatient letters, pathology reports, radiology reports, operation /labour, and delivery notes).
PROFILE 3C:	Provides routine administration support and tasks for a defined area.
PROFILE 3D:	Ensures financial information is processed in accordance with procedures and in order to provide information for payments or receipts.
PROFILE 3E:	Undertake day-to-day updates of records, ensuring data quality and provide reports.
PROFILE 2A:	Responds to and resolves enquiries via the telephone
PROFILE 2B:	Inputs and processes financial/purchasing/payroll information, completing routine transactions in accordance with procedures.
PROFILE 2C:	Provides reception services.
PROFILE 1A:	Enters records into information systems; generates standard reports.
PROFILE 1B:	Initiates, retrieves and files case records, responds to routine requests for information.
Clinical Coder:	Analysing clinical records and translating statements into health classification codes

National Health Administration Workers Pay System Operational Guidelines

10. The system support provisions that will apply to the pay rate and job banding system following settlement are set out in the National Health Administration Workers Pay System Operational Guidelines.

⁷ The details of the National Role Profiles are provided in Appendix 1.

Schedule 2: National Job Banding and Pay Rate Structure

National Pay Rate Structure

1. The Terms of Agreement concluded between the parties on 27 November 2020 included agreement to a 7-level job banding structure with roles placed in the bands based on the scoring that had been carried out as part of the work assessment process, using the gender-neutral Pay Equity Work Assessment Tool.⁸
2. The joint DHB / PSA work programme agreed in the Terms of Agreement included the following:
 - The development of a new national pay rate and job banding system that provided pay steps for each band in accordance with the pay design principles included in the Terms of Agreement.
 - A separate exercise to develop a national pay framework and pay scales for Clinical Coders.
3. The National Role profiles and the applicable band / link to pay are set out below:

BAND	PROFILES	KEY FUNCTION OF THE ROLE
BAND 7	Profile 7A:	Functional Leadership or Line Management Leadership of an administration specialist function.
BAND 6	Profile 6B:	Specialist or Technical Leadership/Supervision of an administrative function.
	Profile 6D:	Analyse, Advise and/or resolve complex problems for finance, procurement and/or payroll.
BAND 5	Profile 5A:	Managing the rostering of staff for service(s)/division(s).
	Profile 5B:	Managing a waitlist, schedule template and processes for a clinical service(s).
	Profile 5C:	Provide active, day-to-day administrative coordination across functions to an individual(s), service, or programme of work.
	Profile 5D:	Providing and coordinating access to information internally and/or externally.
BAND 4	Profile 4A:	Providing a range of administration services to an individual, service or department or project.
BAND 3	Profile 3A:	Inputs and processes information, completing routine payroll transactions in accordance with procedures.
	Profile 3B:	Transcription of medical information (outpatient letters, pathology reports, radiology reports, operation /labour, and delivery notes).
	Profile 3C:	Provides routine administration support and tasks for a defined area.
	Profile 3D:	Ensures financial information is processed in accordance with procedures and to provide information for payments or receipts.
	Profile 3E:	Undertake day-to-day updates of records, ensuring data quality and provide reports.
BAND 2	Profile 2A:	Responds to and resolves enquiries via the telephone
	Profile 2B:	Inputs and processes financial/purchasing/payroll information, completing routine transactions in accordance with procedures.
	Profile 2C:	Provides reception services.
BAND 1	Profile 1A:	Enters records into information systems; generates standard reports.
	Profile 1B:	Initiates, retrieves, and files case records, responds to routine requests for information.
Schedule 3	Clinical Coder:	Analysing clinical records and translating statements into health classification codes

⁸ The Pay Equity Assessment Tool (PEAT) was developed by Te Kawa Mataaho Public Service Commission to assist the parties to pay equity claims.

Pay Bands and Pay Steps

4. The pay rate table below sets out the national pay bands and pay steps in each national pay band of the National Pay Rate and Job Banding Structure for administration and clerical employees for roles covered by the pay equity claim. All new employees' roles covered by the claim will be mapped on to the new pay structure. This will include allocation to a pay band and a pay step within the band.

The following pay bands and steps do not apply to Clinical Coders, whose pay rates and pay structure is set out in Schedule 3.

Administration and Clerical Pay Scales

CLERICAL AND ADMINISTRATION PAY EQUITY RATES									
Band	Maximum Rate	Number of steps	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7
Band 7	86,700	7	73,695	75,863	78,030	80,198	82,365	84,533	86,700
Band 6	81,600	7	71,196	72,930	74,664	76,398	78,132	79,866	81,600
Band 5	75,480	6	67,932	69,442	70,951	72,461	73,970	75,480	
Band 4	72,114	6	64,903	66,345	67,787	69,229	70,672	72,114	
Band 3	68,340	5	59,627	61,805	63,984	66,161	68,340		
Band 2	63,240	4	55,177	57,865	60,552	63,240			
Band 1	57,630	3	51,291	54,461	57,630				

Pay Structure Rules

5. The pay structure rules set out below do not apply to Clinical Coders. For all other employees the pay structure rules are as follows:

Progression

- 5.1 Progression through the pay steps will be by automatic annual service-based increment. This is consistent with the agreed pay design principles and the Gender Pay Principles.

Maintenance of Salary

- 5.2 No existing employee will have their pay reduced to progress into a higher band.
- 5.3 The employee will retain their rate and start at a step that reflects the experience gained working in the health sector environment and progress through the steps while the pay rate is maintained until the steps surpass the pay rate held
- 5.4 Employees who move to another role within the same band will retain their current step and salary anniversary date.

Salary Anniversary Date

- 5.5 The salary anniversary date is the anniversary of the date the individual commenced employment in their current band.
- 5.6 Where an employee moves to a job in a higher pay band, their salary anniversary date becomes the date they commenced in the new role in the band.
- 5.7 In all other cases, including changing jobs within the same band or moving to another band as part of an organisational change process, salary anniversary dates will remain unchanged.

Starting Rate

- 5.8 All staff new to a role will commence on step 1 of the relevant pay band, with the exception of the following:
- 5.8.1 **Recognition of prior experience** - Where an applicant to a role has highly relevant previous experience (more cumulative experience than the minimum listed in the profile description), a commencement step of 2 or 3 will be agreed by the hiring manager / professional lead, in consultation with HR on the following basis:

Relevant Cumulative Experience	Starting Step
2 or more years more than the minimum experience referenced in the profile	Step 2
4 or more years more than minimum experience referenced in the profile	Step 3

- 5.8.2 **Same band at different DHB:** An employee who moves to a role profile in the same band at another DHB will be appointed at their existing band and step and will retain their salary anniversary date.
- 5.8.3 **Gaps in service of less than 2 years:** If a new recruit is returning to work that is the same or similar to their previous role, they will return to the *higher* of their previous step placement or the step assessment based on recognition of prior experience.

Schedule 3: Clinical Coder Pay Rate Structure

- The Terms of Agreement included the commitment for the parties to develop a national pay structure for Clinical Coders which is set out below. The national qualification and training based framework is set out in the National Health Administration Workers Pay System Operational Guidelines

Pay Levels

- The following are the pay rates that apply to Clinical Coders:

Levels		Level Value	Tertiary Adjustment	Note
Level 0	Trainee / Apprentice	69,360		This is fully managed
Level 1	Novice	71,652	No change	
Level 2	Developing	74,019	No Change	
Level 3	Competent	76,464	6.5%	Added to base
Level 4	Proficient	78,990	8%	Added to base
Level 5	Expert	81,600	10%	Added to base
Level 6	Auditor	86,700	10%	Appointed role

Note: This pay level framework applies to Clinical Coders only.

Tertiary Adjuster

- The basis of the tertiary adjustment is to account for the amount of time a Clinical Coder spends working on the more complex work (tertiary and quaternary). The adjustment will apply to Clinical Coders when 40% of the discharges completed by the Clinical Coder is where the clinical specialty being coded is predominately completed at a tertiary or quaternary level (determined by the % of IDFs (at least 50% of the discharges are IDFs in a specialty)

Clinical Coder Pay Structure Rules

- Salary on Appointment:** At commencement of employment, an employee will be placed on the salary level equivalent to their qualification level as set out in the salary framework. If an employee moves to a Clinical Coder role in another DHB they will be appointed to the same salary level.
- Gaps in service of less than 2 years:** If a new recruit is returning to work that is the same or similar to their previous role, they will return to the higher of their previous step placement or the step assessment based on recognition of prior experience.
- Progression Between Levels**
 - The Clinical Coder salary framework operates under the principle that employees will be progressed to the next salary level when they meet all the requirements as set out in the salary framework.
 - The DHB and the employee have a mutual interest in ensuring that employees have the necessary qualifications and skills to undertake coding work.

- 6.3 It is an expectation that employees are supported to progress and that employees will not be disadvantaged if the support is not provided.
- 6.4 Salary progression will date from the time an employee meets the criteria set out in the Clinical Coder Level Framework. If an employee believes that they meet the requirements to progress to the next level, they can request in writing to be considered for progression.
- 7. **Auditor:** The Auditor level is to recognise a Clinical Coder appointed to the role of Auditor.

Schedule 4: Translation and Appeals

1. The remuneration that the parties have agreed does not differentiate between male and female employees on the basis of sex⁹ is represented in the pay rate, job banding and pay steps structure set out in this settlement agreement.
2. The appeals process¹⁰ is about the individual outcomes of the translation to a new national pay rate, job banding and pay steps structure for a workforce characterised by 1500 job titles and highly variable pay rates within, between and across 4 regional MECAs. The appeals process is intended to provide a limited one-off right for employees to raise a dispute about the role they have been mapped to or the time in role that has been taken into account in step placement.

Translation of employees covered by the Settlement Agreement

3. The translation of employees covered by the pay equity claim to the national pay rate, job banding and pay steps structure covers both band placement and the step in the applicable band. Employee salaries will not be reduced as a result of the translation. In such a case, employees will be moved to the nearest highest salary step to their current salary.
4. Band placement is determined by the National Health Administration and Clerical Role Profile that the work carried out by the employee has been mapped to. Guidance for mapping to the role profiles is in the National Health Administration Workers Pay System Operational Guidelines.
5. Translation to the step in the applicable pay band is based on the time that an employee has been carrying out the work that has been mapped to the appropriate National Health Administration and Clerical Role Profile. Time in role has been determined by a one-off 'time in role' calculation which identifies the start date of the employee's current role¹¹.

Appeals on Translation to the National Health Administration and Clerical Pay Rate, Job Banding and Pay Rate Structure

6. **Appeals Process:** The appeals process is set out below:
 - 6.1 The following sets out the steps in the process for appeals:
 - 6.1.1 An employee or group of employees who believe that they were not correctly mapped to a national role profile or correctly translated to the new pay structure or considered out of scope may appeal in accordance with the following:
 - 6.1.2 **Submission of appeal**
 - The grounds for appeal are that the employee considers that the role was incorrectly mapped or translated or considered out of scope in the implementation process.
 - All appeals will be submitted to the appropriate DHB / PSA Translation Appeals Committee (refer paragraph 6.2 and 6.3).

⁹ Section 13ZH Equal Pay Act 1972.

¹⁰ The Terms of Agreement concluded between the parties on 27 November 2020 included provisions for appeals in relation to the translation of employees from their existing pay rate and pay framework to the National Health Administration and Clerical Pay Rate, Job Banding and Pay Rate Structure.

¹¹ This is different to length of service at a DHB. The parties developed guidance to support this exercise.

6.1.3 Timelines

Appeals submitted within 6 weeks

- Appeals should be submitted within 6 weeks from the employee receiving their notification of role and salary step in the national pay rate, job banding and pay step structure.
- If the appeal outcome shows a change in band/step, the change shall be implemented on the effective date of the pay equity settlement.

Appeals submitted after 6 weeks

- Appeals received after 6 weeks will be backdated to the date of submission; except where the employee is on leave or leave without pay at the time of notification, in which case the 6 weeks shall begin from when they return to work.
- An employee or a group of employees may appeal on the basis they consider their role was inadvertently mapped to the wrong role profile during the mapping exercise. This needs to include the reasons why the review was not sought under the appeals process within the 6-week period. In such cases, the outcome of a successful appeal will be effective from the date of settlement. The period of time for such appeals will be open for a period of 18 months.

Outcomes of appeals

- The outcome of the appeal will be communicated to the employee within 6 weeks of the appeal application.

6.1.4 Appeal procedure

- An employee who wishes to appeal their mapping or translation outcome is to complete and send an application form requesting the review to the appropriate DHB / PSA Translation Appeals Committee
- The form will state the particulars of the request for a review, include a description of the work the employee carries out and state the grounds for review. The application will include:
 - Where available, a position description and task list agreed between the employee and the manager
 - Copy of letter advising the employee of the role they are mapped to and salary level they have been translated to.
 - An outline of why the employee considers that they have been incorrectly mapped or translated or considered out of scope.
- The employee will send the form to the appropriate DHB / PSA Translation Appeals Committee within 6 weeks of receiving notification of the mapping and translation outcome.
- Incomplete applications will be sent back to the employee with advice on what further information is required. Line managers will support employees to provide this information.

6.2 Translation Appeals Committee (General)

6.2.1 The local Translation Appeals Committee will comprise a balanced DHB / PSA group agreed locally.

6.2.2 A typical group would include –

- 1 x DHB and 1 x PSA from mapping
- Local PSA organiser plus a delegate / member
- DHB PE Lead / Professional Lead
- DHB HR Advisor / ER

6.2.3 If there is no resolution at the local committee level, the matter will be elevated to a national review committee (2 x DHB; 2 x PSA) and the decision will be final.

Note: This Appeals Committee process does not apply to Clinical Coders. Clinical Coders are covered by the provisions in paragraph 6.3.

6.3 Translation Appeals Committee (Clinical Coders)

6.3.1 If an appeal is initiated by a Clinical Coder, the following process will apply:

- The review will be forwarded to a National Clinical Coder Translation Appeals Committee with the following members:
 - DHB Representative, Coding Lead
 - Senior Coder, Subject Matter Expert
 - PSA Coder delegate
- The decision of the National Clinical Coder Appeals Committee will be final

Appendix 1: National Health Administration Role Profiles


BAND	PROFILES	KEY FUNCTION OF THE ROLE
BAND 7	Profile 7A:	Functional Leadership or Line Management Leadership of an administration specialist function.
BAND 6	Profile 6B:	Specialist or Technical Leadership/Supervision of an administrative function.
	Profile 6D:	Analyse, Advise and/or resolve complex problems for finance, procurement and/or payroll.
BAND 5	Profile 5A:	Managing the rostering of staff for service(s)/division(s).
	Profile 5B:	Managing a waitlist, schedule template and processes for a clinical service(s).
	Profile 5C:	Provide active, day-to-day administrative coordination across functions to an individual(s), service, or programme of work.
	Profile 5D:	Providing and coordinating access to information internally and/or externally.
BAND 4	Profile 4A:	Providing a range of administration services to an individual, service or department or project.
BAND 3	Profile 3A:	Inputs and processes information, completing routine payroll transactions in accordance with procedures.
	Profile 3B:	Transcription of medical information (outpatient letters, pathology reports, radiology reports, operation /labour, and delivery notes).
	Profile 3C:	Provides routine administration support and tasks for a defined area.
	Profile 3D:	Ensures financial information is processed in accordance with procedures and to provide information for payments or receipts.
	Profile 3E:	Undertake day-to-day updates of records, ensuring data quality and provide reports.
BAND 2	Profile 2A:	Responds to and resolves enquiries via the telephone
	Profile 2B:	Inputs and processes financial/purchasing/payroll information, completing routine transactions in accordance with procedures.
	Profile 2C:	Provides reception services.
BAND 1	Profile 1A:	Enters records into information systems; generates standard reports.
	Profile 1B:	Initiates, retrieves, and files case records, responds to routine requests for information.

Profile	Key function of the role
Clinical Coder:	Analysing clinical records and translating statements into health classification codes

Profile 7A






Key function of the role: Functional Leadership or Line Management Leadership of an administration specialist function.

 <p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • Knowledge of management and administrative procedures and systems, the majority of which are non-routine, acquired through training and experience plus knowledge of specialist functional, organisational policies and procedures. Knowledge and experience to deal with non-routine issues such as problem solving for an area of work or developing alternative or additional procedures. Leadership and coaching skills. Twenty-four (24) months previous experience working in an administration role to consolidate knowledge and skills. On average it takes eighteen (18) months on the job to develop leadership/administrative skills and to become familiar with relevant policies and procedures. • Uses judgement when providing direction to staff in processes and policies. • In issues for which no guidelines apply, utilises a choice of methods or procedures, analysis and troubleshooting to ensure the information entered meets department or service requirements. Judgement is required when interpreting guidelines and standards to determine best practices for the area. • Requires appropriate tact when interacting and discussing issues with other departments. Has regular contact with clients/patients/residents and provides program/departmental information. • Keyboard skills for regular use of computer systems. • Communicating complex, sensitive information with a range of staff internally and externally across the organisation/organisations; liaises with external organisations, negotiating and persuasive skills required.
 <p>Responsibilities</p>	<ul style="list-style-type: none"> • Provides regular direction, assigns and organises work and checks the work of staff. Achieves assigned objectives through planning, implementing, staffing and providing technical support. Work involves developing plans to achieve short term goals associated with coordinating workflow. • Delegated budget for office equipment and services; authorises expenses • Provides general non-clinical advice, information, guidance or ancillary services directly to consumers and their whānau. Manages complains about the service. Implements policies for own work area and proposes policy or service changes which impact beyond own area of activity. • Works without supervision, advice available from Line Manager when required. • Leads initiatives to enhance effectiveness of services through planning, organizing, implementing, staffing and quality assurance. • Initiates improvements to systems and processes. This requires negotiation and persuasion to ensure they are adopted.
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • May hold a delegated budget/responsible for purchase of physical assets/authorises financial payments. Works without supervision, advice available from Line Manager when required. • Accountable for the work produced by the team /service in relation to the quality and timeliness of work, which if not met would have impact to goals set outside the DHB • Guided by principles and broad organisational policies or regulations
 <p>Leadership</p>	<ul style="list-style-type: none"> • Primarily has direct accountability/responsibility for leadership of more than one staff member in work assignments or coordination/direction of groups on an ongoing basis. This is generally full-time supervision, responsible for allocation, direction and monitoring of work while exercising team leadership and coaching skills. • Deals with performance reviews; leave management; disciplinary and grievance matters; recruitment and selection decisions; personal and career development; departmental workload and allocation (that is allocation and re-allocation of blocks of work or responsibilities for areas of activity, not just allocation of tasks to individuals). <p>OR</p> <ul style="list-style-type: none"> • Primarily has direct accountability/responsibility of an administration function coordination/direction of groups on an ongoing basis. <ul style="list-style-type: none"> ○ The team members will not necessarily be direct reports, but this role will have a significant influencing and education role for internal and external parties. ○ Provides professional leadership to staff, including staff who are more senior or who have other roles

	<p>Guidance:</p> <ul style="list-style-type: none"> o If the role is a line management role but has limited or no HR and finance delegations, then consider Profile 6B
 <p>Demands</p>	<ul style="list-style-type: none"> • Occasional exposure to distressing circumstances (for example staff issues or dealing with complaints from or distressed consumers or stakeholders) Regular sensory effort requiring concentration on computer work and report writing/editing with periods of competing multiple sensory demands. • Regular physical effort such as lifting, walking and standing with regular computer operation/keyboarding requiring accurate coordination of fine motor skills. • Occasional exposure to minor conditions such as verbal abuse, interruptions and multiple deadlines with some travel.






Profile 6B

Key function of the role: Specialist or Technical Leadership/Supervision of an administrative function.

 <p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • Knowledge of supervision and administrative procedures and systems, the majority of which are non-routine, acquired through training and experience plus knowledge of specialist functional/medical/legal terms, organisational policies and procedures and knowledge and experience to deal with non-routine issues such as problem solving for an area of work or developing alternative or additional procedures. Twenty-four (24) months previous related administration experience to consolidate knowledge and skills. • On average it takes twelve (12) months on the job to develop supervisory/coordination skills and to become familiar with relevant policies and procedures. • Uses judgement when providing direction to staff in processes and policies. In issues for which no guidelines apply, utilises a choice of methods or procedures, analysis and troubleshooting to ensure the information entered meets department or service requirements. Judgement is required when interpreting guidelines and standards to determine best practices for the area • Exchanges information with patients, relatives and staff on a variety of departmental matters and procedures, anxious patients and relatives, cultural or language difficulties/communicates complicated administrative information to staff from other departments, external contacts. • Requires appropriate tact when interacting and discussing issues with other departments. Has regular contact with consumer and provides program/departmental information. • Keyboards skills for regular use of computer systems.
 <p>Responsibilities</p>	<ul style="list-style-type: none"> • Achieves assigned objectives through planning, implementing, staffing and providing technical support. Work involves developing plans to achieve short term goals associated with coordinating workflow. • Provides general non-clinical advice, information, guidance or ancillary services directly to consumers and whānau. Implements policies for own work area and proposes policy or service changes which impact beyond own area of activity. • Leads initiatives to enhance effectiveness of services through planning, organising, implementing, staffing and quality assurance.
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • Interpretation is required when using practices, processes, and procedures. • Is accountable for the day-to-day work of others and for making sure others are trained to a specific standard. • Whilst support is generally available from more senior or experienced employees this is not usually required daily.
 <p>Leadership</p>	<p>Guidance:</p> <ul style="list-style-type: none"> o If the role has FULL HR and finance delegations for the team, then consider the Profile 7A. <ul style="list-style-type: none"> • Primarily has direct accountability/responsibility for supervision of more than one staff member in work tasks or coordination/direction of groups on an ongoing basis. This is generally full-time supervision, responsible for allocation, direction and monitoring of work while exercising team leadership and coaching skills.
 <p>Demands</p>	<ul style="list-style-type: none"> • Occasional exposure to distressing circumstances (for example staff issues or dealing with complaints from or distressed consumers or stakeholders) Regular sensory effort requiring concentration on computer work and report writing/editing with periods of competing multiple sensory demands. • Regular physical effort such as lifting, walking and standing with regular computer operation/keyboarding requiring accurate coordination of fine motor skills. • Occasional exposure to minor conditions such as verbal abuse, interruptions and multiple deadlines with some travel.






Profile 6D

Key function of the role: Analyse, advise and/or resolve complex problems for finance, procurement and/or payroll.

 <p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • Twenty-four (24) months previous experience in a multi collective environment to consolidate knowledge and skills. Twelve (12) months on the job experience to develop advanced knowledge in procurement/payroll/accounting practices with regards to relevant legislation, benefits administration, collective agreements, computer software and become familiar with department policies and procedures. Breadth and depth of knowledge of a range of related legislation or industrial instruments such as MECAs and DHB policies relating to payroll, purchasing and public finance act. • Plans own day to day work/schedules work to meet weekly, monthly, quarterly, and annual financial or HR timetables. • Analyses data. Analyses, investigates and resolves complex queries and discrepancies • Requires diplomacy to discuss financial queries with staff, which are often complex, including reasons for delays in payment and other sensitive issues; provides advice on complex payroll issues to non-payroll managers. Requires regular contact with employees and outside agencies using discretion. • Keyboards skills for regular use of computer system.
 <p>Responsibilities</p>	<ul style="list-style-type: none"> • Follows and interprets accepted practices, existing rules and regulations regarding area of specialty. Achieves assigned objectives through planning, implementing and providing technical support to others. Develops plans to achieve short-term goals associated with changes to legislation or industrial instruments coordinating workflow for the team. Performs functions in accordance with rules and regulations. Uses a variety of methods to analyse and troubleshoot problems to achieve the desired outcome. • Regular requirement to design and develop or create reports, documents. • Prepares payroll/accounts/contracts for approval and payment. • Proposes changes to working practices and procedures (for example when planning for the impact of new legislation) • Provides data entry audit and incorrect data entry will result in payroll errors causing staff inconvenience, delays to subsequent reports/records and embarrassment in employee relations. Errors can impact legal obligations.
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • Discretion is applied when applying known practices, processes, and procedures. Whilst support is generally available from more senior or experienced employees this is not usually required daily. • Processes designed need to meet a range of compliance standards that are set by legislation.
 <p>Leadership</p>	<ul style="list-style-type: none"> • May show others how to perform tasks or duties by familiarising others with the work area and processes. • Provides information and assistance to staff outside of their team or group to assist them to understand their employment documents and entitlements (for example how to read or understand pay advice or access systems to make applications for leave etc)
 <p>Demands</p>	<ul style="list-style-type: none"> • The work involves working in emotionally demanding situations on an occasional basis (for example staff financial issues) • Concentration required when checking information and when answering queries from staff; may be required to switch tasks to prioritise urgent activities. • Inputting at a keyboard, telephone equipment for most of the day with frequent periods of data entry. • Office or similar conditions, occasional verbal aggression from staff, interruptions, and multiple deadlines.






Profile 5A

Key function of the role: Managing the rostering of staff for service(s)/division(s).

 <p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • Knowledge of administrative procedures and systems specialised computerised scheduling programs, appropriate guidelines and procedures acquired through training and experience. Twelve (12) months previous experience working in an office environment to develop organizational skills and gain an understanding of functional requirements of the organisation. Twelve (12) months on the job to gain a working knowledge of collective agreements, scheduling processes, computerised scheduling programs and to become familiar with DHB/facility/department policies and procedures. • Choice of action is expected when modifying daily schedules to meet emergencies. Requires interpretation of collective agreements while scheduling staff. • Has regular contact with health care practitioners which often requires persuasion and motivation. Has regular contact with schedulers, various departments and payroll regarding staffing and scheduling requirements which requires tact/discretion and persuasion when calling to replace staff. • Keyboards skills for regular use of computer systems.
 <p>Responsibilities</p>	<p>Guidance:</p> <ul style="list-style-type: none"> o The role holder must be responsible for the creation and management of staff rosters, and, staff rostering/allocation be the primary focus of the role to match to this profile • Follows rostering guidelines when coordinating and maintaining schedules for services. Uses judgement when making changes; to support services to operate safely and meet targets. Uses initiative within standard operating procedures, advice available from supervisor or other senior staff. Must take account of MoH and DHB guidelines when making scheduling decisions. Performs scheduling according to collective agreements. May exercise judgement to accommodate changing master rotation requirements. • Regular requirement to develop or create reports, documents; responsible for maintaining one or more waitlist • Scheduling errors or errors in master rotations may cause embarrassment or loss of trust with employees. Inaccuracies in rotations and assignments may result in staff shortages.
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • Discretion is applied when applying known practices, processes, and procedures. Whilst support is generally available from more senior or experienced employees this is not usually required daily. Accountable for the quality and timeliness of work, which if not met would have impact to service safe staffing.
 <p>Leadership</p>	<ul style="list-style-type: none"> • May show others how to perform tasks or duties by familiarising others with the work area and processes. • Provides functional guidance to staff, including staff who are more senior or who have other roles (for example staffing assignments or leave procedures). • Assigns placements, shifts and checks attendance of staff against expected schedule
 <p>Demands</p>	<ul style="list-style-type: none"> • The work involves working in emotionally demanding situations on an occasional basis • Concentration required when checking information and when answering queries from staff; may be required to switch tasks to prioritise urgent activities. • Inputting at a keyboard, telephone equipment for most of the day with frequent use of computer screens. • Office or similar conditions, occasional verbal aggression from staff, interruptions and multiple deadlines.






Profile 5B

Key function of the role: Managing a waitlist, schedule template and processes for a clinical service(s).

 <p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • Knowledge of administrative procedures and systems specialised computerised scheduling programs, appropriate guidelines and procedures acquired through training and experience. Twelve (12) months previous experience working in a health environment utilising medical terminology. On average it takes twelve (12) months on the job to learn specialised scheduling, scheduling programs, appropriate guidelines and to become familiar with relevant policies and procedures. • Has some choice of action within accepted practice when modifying schedules to meet urgent requests. Uses discretion when scheduling to meet consumer needs. Some information is readily available, but investigation and reference to other sources may be needed to inform solutions or the course of action. • Has regular contact with health care practitioners which often requires persuasion and motivation for coordinating procedures which require multiple specialists. Contact with patients/provides advice, information and guidance to patients, carers and relatives about appointments, clinics, admissions. • Keyboards skills for regular use of computer systems.
 <p>Responsibilities</p>	<p>Guidance:</p> <ul style="list-style-type: none"> o The role holder must be responsible for schedule maintenance and waitlist management to match to this profile <ul style="list-style-type: none"> • Follows scheduling guidelines when coordinating and maintaining schedules for services. Uses judgement when making changes; to support services and consumers to meet targets. Uses initiative within standard operating procedures, advice available from supervisor or other senior staff. Must take account of MoH and DHB guidelines when making scheduling decisions. • Regular requirement to develop or create reports, documents; responsible for maintaining one or more waitlist • Misjudgement in coordinating appropriate services for consumers may delay related services and coordination that they do has an impact on patient care and efficient utilisation of resources
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • Discretion is applied when applying known practices, processes, and procedures. Whilst support is generally available from more senior or experienced employees this is not usually required daily. Accountable for the quality and timeliness of work, which if not met would have impact to goals set outside the DHB
 <p>Leadership</p>	<ul style="list-style-type: none"> • May show others how to perform tasks or duties by familiarising others with the work area and processes. Provides functional guidance to staff, including staff who are more senior or who have other roles (for example notes management, file storage, ordering).
 <p>Demands</p>	<ul style="list-style-type: none"> • The work involves working in emotionally demanding situations on an occasional basis • Concentration required when checking information and when answering queries from staff; may be required to switch tasks to prioritise urgent activities. • Inputting at a keyboard, telephone equipment for most of the day with frequent use of computer screens. • Office or similar conditions, occasional verbal aggression from staff, interruptions and multiple deadlines.






Profile 5C

Key function of the role: Provide active, day-to-day administrative coordination across functions to an individual(s), service or programme of work.

 <p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • Knowledge of the full range of administrative and organisational policies and procedures acquired through training. Thirty-six (36) months previous experience as an administration professional to consolidate knowledge and skills. On average it takes twelve (12) months on the job to develop administrative skills and to become familiar with relevant policies and procedures. • Plans and organises meetings; prioritise own project work/organises a range of events and conferences, including organising speakers; manages a range of projects or complex activities. Skills for investigating a variety of issues and proposing solutions; dealing with complex enquiries. Advanced level use of IT packages. • Communicating complex, sensitive information with a range of staff internally and externally across the organisation/organisations; liaises with external organisations, negotiating and persuasive skills required. • Keyboard skills for regular use of computer systems/touch or audio typing
 <p>Responsibilities</p>	<ul style="list-style-type: none"> • Provides the administrative support functions of the department/service/project. Solutions to finance, scheduling or workflow problems are resolved in accordance with existing procedures and practices. Works autonomously but can seek advice when necessary/manages a discrete area of work Responsibility for office equipment; orders and supplies and stationery; prepares reports and documents for signing. • Processes a variety of commercially sensitive finance and administration information • Updates, maintains, stores clinical or non-clinical records, appointment details. Takes, transcribes formal minutes, monitors milestones and actions from governance committees; maintains computerised appointment system • Provides administration and reception services to meet quality and service requirements. Inaccurate maintenance of records may affect other activities within the organisation or project. Misjudgements in coordination of appointments could delay related or succeeding services.
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • Discretion is applied when applying known practices, processes, and procedures. Whilst support is generally available from more senior or experienced employees this is not usually required daily. Accountable for the quality and timeliness of work, which if not met would have impact to goals set outside the DHB Implement policies and propose changes to practices, procedures for own area
 <p>Leadership</p>	<ul style="list-style-type: none"> • May show others how to perform tasks or duties by familiarising others with the work area and processes. Provides functional guidance to staff, including staff who are more senior or who have other roles (for example notes management, file storage, ordering). • May lead initiatives to improve practices within the team or to other team members being supported. • Coordinates work on behalf of a more senior manager.
 <p>Demands</p>	<ul style="list-style-type: none"> • The work involves working in emotionally demanding situations on an occasional basis • Concentration required when checking information and when answering queries from staff; may be required to switch tasks to prioritise urgent activities. • Inputting at a keyboard, telephone equipment for most of the day with frequent use of computer screens. • Office or similar conditions, occasional verbal aggression from staff, interruptions and multiple deadlines.






Profile 5D

Key function of the role: Providing and coordinating access to information internally and/or externally.

 <p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • Knowledge of administrative procedures and systems acquired through training and experience plus knowledge of a particular specialist area including relevant medical/legal terms, organisational policies and procedures and knowledge and experience to deal with non-routine issues such as problem solving for an area of work or developing alternative or additional procedures. Twenty-four (24) months previous related administration experience to consolidate knowledge and skills. On average it takes twelve (12) months on the job to develop audit/coaching skills and to become familiar with relevant policies and procedures. • Judgement is required when interpreting guidelines and standards to determine best practices for the area • Communicating complex, sensitive information with a range of staff internally and externally across the organisation/organisations; liaises with external organisations, negotiating and persuasive skills required. Communicates work procedures, induction of new staff, maintains working relationships with own and other departments, trains and motivates staff to achieve objectives. • Keyboard skills for regular use of computer systems
 <p>Responsibilities</p>	<ul style="list-style-type: none"> • Proposes changes to working procedures, implements procedures set by others. • Provides advice around area of technical specialty for example (provides advice and guidance to staff on disclosure of information in accordance with current legislation) Maintains and updates databases, regular requirement to develop or create reports and documents • Proposes changes to working practices and procedures (for example when planning for impact of new legislation, new systems)
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • Discretion is applied when applying known practices, processes, and procedures. Whilst support is generally available from more senior or experienced employees this is not usually required daily. Accountable for the quality and timeliness of work, which if not met would have impact on legislative requirements.
 <p>Leadership</p>	<ul style="list-style-type: none"> • Demonstrates, explains practices and procedures to new, less experienced staff and checks the work of others • Provides functional guidance to staff, including staff who are more senior or who have other roles (for example correct procedures). • May lead initiatives to improve practices within the team or to other team members being supported.
 <p>Demands</p>	<ul style="list-style-type: none"> • The work involves working in emotionally demanding situations on an occasional basis • Concentration required when checking information and when answering queries from staff; may be required to switch tasks to prioritise urgent activities. • Inputting at a keyboard, telephone equipment for most of the day with frequent use of computer screens. • Office or similar conditions, occasional verbal aggression from staff, interruptions and multiple deadlines.






Profile 4A

Key function of the role: Providing a range of administration services to an individual, service or department or project.

 <p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • Knowledge of administrative procedures and systems, activities such as answering queries, progress chasing, task-related problem solving, acquired through experience and training. Knowledge of some medical terminology learned through experience and training. Twenty-four (24) months previous related office experience to consolidate knowledge and skills. On average it takes twelve (12) months on the job to develop administrative skills and become familiar with department policies and procedures. knowledge and experience to deal with non-routine issues such as problem solving for an area of work or developing alternative or additional procedures. • Solutions to purchasing, appointments or workflow problems are resolved in accordance with existing procedures and practices. Uses discretion when responding to consumer situations. Coordinates staff rotas and cover; arranges clinics appointments; arranges meetings; manages diaries. May organises events, conferences, MDT meetings. • Requires appropriate discretion and tact when interacting and discussing issues with staff, managers or other departments. Requires discretion when dealing with various special needs groups, especially with consumers who may be under significant stress. • Keyboards skills for regular use of computer systems/touch or audio typing
 <p>Responsibilities</p>	<ul style="list-style-type: none"> • Administrative work is performed according to standard practice. Uses judgement when resolving administrative problems (finance, purchasing, scheduling). Regular requirement to develop or create reports, documents. Monitors deadlines on behalf or team or project. • Responsibility for office equipment; orders and supplies and stationery; prepares documents for signing. Updates, maintains, stores clinical or non-clinical records, appointment/meeting details. Takes, transcribes formal minutes; maintains computerised appointment system • Provides advice, information and guidance to others (for example to consumers about appointments, clinics, admissions or staff about uses of database information) • Inaccurate maintenance of records may affect other activities within the service/department. Misjudgements in coordination of appointments could delay related or succeeding services. Inefficient or ineffective support can impact the outcomes of the team being supported.
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • Discretion is applied when applying known practices, processes, and procedures. Whilst support is generally available from more senior or experienced employees this is not usually required daily. Accountable for the quality and timeliness of work, which if not met would have impact to goals set outside the DHB
 <p>Leadership</p>	<ul style="list-style-type: none"> • May show others how to perform tasks or duties by familiarising others with the work area and processes. Provides functional guidance to staff, including staff who are more senior or who have other roles (for example notes management, file storage, ordering).
 <p>Demands</p>	<ul style="list-style-type: none"> • The work involves working in emotionally demanding situations on an occasional basis • Concentration required when checking information and when answering queries from staff; may be required to switch tasks to prioritise urgent activities. • Inputting at a keyboard, telephone equipment for most of the day with frequent use of computer screens. • Office or similar conditions, occasional verbal aggression from staff, interruptions and multiple deadlines.






Profile 3A

Key function of the role: Inputs and processes information, completing routine payroll transactions in accordance with procedures.

 <p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • Knowledge of payroll processes and payroll and HR systems acquired through training. On average it takes nine (9) months on the job experience to gain a general understanding of payroll system, collective bargaining agreements, legislation, and become familiar with relevant organisational policies and procedures. • Plans own day to day work/schedules work to meet weekly, monthly, quarterly, and annual financial or HR timetables. • Requires diplomacy and tact to discuss payroll issues and payroll data. Requires regular contact with employees and outside agencies (IRD) using discretion. • Keyboards skills for regular use of computer system.
 <p>Responsibilities</p>	<ul style="list-style-type: none"> • Provides payroll services, following clearly prescribed practices, by processing payroll and benefits information, data entry and other clerical duties. Verifies and processes employee work records (timesheets) and resolves issues using a selected number of alternatives. • Regular requirement to develop or create reports, documents. • Prepares payroll for approval and payment. • Works within set routines with little direct supervision but with advice available when required. Processes are governed by legislation and union contracts, can escalate issues to supervisor, ER advisor or HR managers. • Provides payroll data entry and clerical duties to meet quality and service requirements. Incorrect data entry will result in payroll errors causing staff inconvenience, delays to subsequent reports/records and embarrassment in employee relations. Errors can impact legal obligations.
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • Discretion is applied when applying known practices, processes, and procedures. Support is generally available from more senior or experienced employees. • Accountable for the quality of own work.
 <p>Leadership</p>	<ul style="list-style-type: none"> • May show others how to perform tasks or duties by familiarising others with the work area and processes. • Provides information and assistance to staff outside of their team or group to assist them to understand their employment documents and entitlements e.g. how to read or understand pay advices or access systems to make applications for leave etc.
 <p>Demands</p>	<ul style="list-style-type: none"> • The work involves working in emotionally demanding situations on an occasional basis (for example staff financial issues) • Concentration required when checking information and when answering queries from staff; may be required to switch tasks to prioritise urgent activities. • Inputting at a keyboard, telephone equipment for most of the day with frequent periods of data entry. • Office or similar conditions, occasional verbal aggression from staff, interruptions, and multiple deadlines.






Profile 3B

Key function of the role: Transcription of medical information (outpatient letters, pathology reports, radiology reports, operation /labour, and delivery notes).

 <p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • Knowledge of a range of patient administration systems and transcription software acquired through training. Twelve (12) months previous experience working within a medical or similar environment. On average it takes twelve (12) months on the job to become familiar with various reports, clinical services, terminology and medications, and relevant policies and procedures. • Has ability to prioritise work. Issues regarding dictation interpretation may require some problem solving. Workload is allocated, organises own day to day tasks. Requires appropriate tact when interacting and discussing dictation issues with clinical staff. Communicates and coaches staff from other departments on dictation and template use. • Advanced keyboard skills for regular use of computer systems/touch or audio typing
 <p>Responsibilities</p>	<p>Guidance:</p> <ul style="list-style-type: none"> o This role applies when the worker is required to spend 90% of time transcribing documents for clinicians or on behalf of clinical services. • Completes the process of transcribing voice-recorded medical reports that are dictated by physicians, nurses and other healthcare practitioners. These are dictated over the phone or uploaded digitally. • Transcription work is performed according to standard practice. • Misjudgement in prioritising reports may lead to delays in services to consumers. Inaccurate transcription/data entry can affect subsequent services. Delays in providing transcription can impact on care for consumers.
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • Work is performed within guidance. Support is generally available from more senior or experienced employees
 <p>Leadership</p>	<ul style="list-style-type: none"> • May show others how to perform tasks or duties by familiarising others with the work area and processes.
 <p>Demands</p>	<ul style="list-style-type: none"> • Occasional exposure to distressing circumstances (for example dealing with complaints) Typing documents of a distressing nature (trauma, police reports, dying patients) Regular sensory effort requiring concentration on computer work and report writing/editing with periods of competing multiple sensory demands. • Regular physical effort such as lifting, walking and standing with regular computer operation/keyboarding requiring accurate coordination of fine motor skills. • Frequent exposure to minor conditions such as interruptions and multiple deadlines.






Profile 3C

Key function of the role: Provides routine administration support and tasks for a defined area.

 <p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • Knowledge of administrative procedures and systems, some of which are non-routine but most are routine activities such as answering queries, progress chasing, task related problem solving, acquired through experience and training. Knowledge of some specialty terminology learned through experience and training. On average it takes nine (9) months on the job to acquire understanding of computer programs, and to become familiar with relevant policies and procedures. • Organises own workload. Organises for others (for example transport, appointments and meetings, equipment, room access, sending of samples) Dealing with queries, checking information with staff and patients. Communicating information verbally and in writing, routine information with patients and staff on (for example discharge, admission, transfer) or communicates routine project information. There may be barriers to understanding for example anxious patients, cultural differences, language, or communication difficulties. Provides training to others. • Standard keyboard skills (entering information accurately), manoeuvring notes trollies
 <p>Responsibilities</p>	<ul style="list-style-type: none"> • Provides the administrative support functions for the service area • Follows departmental procedures and policies and takes initiative within standard operating procedures, advice available from supervisor or other senior staff. • Responsibility for office equipment; orders and supplies and stationery, petty cash. • Updates, maintains, stores clinical or non-clinical records, appointment/meeting details. Takes, transcribes formal minutes; maintains computerised appointment system Inaccurate maintenance of records may affect other activities within the service/department. • Misjudgements in coordination of appointments could delay related or succeeding services.
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • Discretion is applied when applying known practices, processes, and procedures. Whilst support is generally available from more senior or experienced employees this is not usually required daily.
 <p>Leadership</p>	<ul style="list-style-type: none"> • May show others how to perform tasks or duties by familiarising others with the work area and processes. Provides functional guidance to staff, including staff who are more senior or who have other roles (for example notes management, file storage, ordering).
 <p>Demands</p>	<ul style="list-style-type: none"> • The work involves working in emotionally demanding situations on an occasional basis. • Concentration required when checking information and when answering queries from staff, customers, public, patients; may be required to switch tasks to prioritise urgent activities. Frequent sensory effort with competing multiple sensory demands such as alarms. Inputting at a keyboard, telephone equipment for most of the day • Office or ward or similar conditions, frequent interruptions, occasional verbal aggression from distressed consumers. Occasional exposure to bodily fluids.






Profile 3D

Key function of the role: Ensures financial information is processed in accordance with procedures and in order to provide information for payments or receipts.

 <p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • Knowledge of finance and procurement procedures and finance and invoicing systems acquired through training. On average it takes nine (9) months on the job experience to gain a general understanding of finance or procurement system, MBIE rules, eligibility rules, legislation, and become familiar with relevant organisational policies and procedures. • Plans own day to day work/schedules work to meet weekly, monthly, quarterly, and annual financial or contract management timetables. • Discusses routine queries from staff, customers and suppliers where there may be issues about non- payment, incorrect or late payments or other sensitive issues; communicates statutory financial or procurement regulations or MBIE rules and contract schedules in a simplified form to non-finance people. • Keyboards skills for regular use of computer system.
 <p>Responsibilities</p>	<ul style="list-style-type: none"> • Follows clearly prescribed practices when handling/balancing cash, data entry, patient financial transactions, contract purchasing and compiling various reports. Solutions to issues are selected from a limited number of alternatives. • Responsible for petty cash float, creating invoices for patients or contractors, handles patient property and travel expenses; collects cash/cheques etc. from other sources (for example catering/car parking, non-resident payments) • Regular requirement to develop or create reports, documents. • Inaccurate records or errors in billing may cause poor relations/embarrassment with clients/patients/residents, families and vendors. Inaccurate cash flow projections may have significant impact on the organisation.
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • Discretion is applied when applying known practices, processes, and procedures. Support is generally available from more senior or experienced employees. • Accountable for the quality of own work.
 <p>Leadership</p>	<ul style="list-style-type: none"> • May show others how to perform tasks or duties by familiarising others with the work area and processes. • Provides information and assistance to staff outside of their team or group to assist them to understand finance or procurement systems how to provide information for invoicing, understand contracts.
 <p>Demands</p>	<ul style="list-style-type: none"> • The work involves working in emotionally demanding situations on an occasional basis (for example difficult supplier relationships) • Concentration required when checking information and when answering queries from staff, contractors or suppliers; may be required to switch tasks to prioritise urgent activities. • Inputting at a keyboard, telephone equipment for most of the day with frequent periods of data entry. • Office or similar conditions, occasional verbal aggression from staff, interruptions, and multiple deadlines.






Profile 3E

Key function of the role: Undertake day-to-day updates of records, ensuring data quality and provide reports.

 <p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • Knowledge of data privacy, confidentiality, patient administration systems/database software acquired through training. Experience of working in an administrative environment and working with computerised data systems. On average it takes six (6) months on the job to consolidate analytical, organisational, problem-solving, communication skills and learn intricacies of the system and become familiar with DHB/facility/department policies and procedure. • Has ability to prioritise work. Workload is allocated, organises own day to day tasks. • Judgement is required when interpreting guidelines and standards to determine best practices for entering, changing and reporting data. • Requires appropriate tact when interacting and discussing data quality issues with clinical staff. Communicates and coaches staff from other departments on data and database use. • Advanced keyboard skills for regular use of computer systems
 <p>Responsibilities</p>	<ul style="list-style-type: none"> • Ensure the quality of data in the electronic systems is in line with the National/Service Specification, through the running of reports, and data analysis. • Identify and process remedial actions identified to ensure standards of data quality are maintained in line with Organisational Policies & Procedures and Service Standard Operating Procedures • Ensure all information contained within systems/spreadsheets/documents is of a consistently high quality to allow for accurate records to be maintained, reporting and trends analysis to be undertaken. • Running reports within the clinical system to be able to find figures as needed. • Responsibility for the identification of anomalies in standard operating procedures to ensure the accuracy of the processes to support data quality.
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • Discretion is applied when applying known practices, processes, and procedures. Support is generally available from more senior or experienced employees. • Accountable for the quality of own work.
 <p>Leadership</p>	<ul style="list-style-type: none"> • May show others how to perform tasks or duties by familiarising others with the work area and processes. • Assist in developing, maintaining and delivering an ongoing education and awareness programme for the improvement of data quality
 <p>Demands</p>	<ul style="list-style-type: none"> • Occasional exposure to information of a distressing nature (trauma, police reports, dying patients) • Regular sensory effort requiring prolonged concentration on computer work and report writing/editing with periods of competing multiple sensory demands. • Regular physical effort such as lifting, walking and standing with regular computer operation/keyboarding requiring accurate coordination of fine motor skills. • Frequent exposure to minor conditions such as interruptions and multiple deadlines.






Profile 2A

Key function of the role: Responds to and resolves enquiries via the telephone

 <p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • Knowledge of a range of patient administration system and telephony software acquired through training. • Twelve (12) months previous experience working with a major telephone system. On average it takes six (6) months on the job to learn various telecommunications systems, codes and become familiar with relevant policies and procedures. • Resolves problems (for example locating notes, appointment issues) when responding to queries, escalating issues when necessary. Ability to assess, resolve and forward enquiries. • Workload is allocated, organises own day to day tasks. • Dealing with queries, checking patient information with staff and consumers. Requires courtesy and tact in all interactions. May be barriers to understanding for example anxious consumers, cultural differences, language or communication difficulties. • Advanced keyboard (typing while listening to callers) and telephone skills
 <p>Responsibilities</p>	<ul style="list-style-type: none"> • Computer based data entry of information for example updating directories or patient information. • Requires careful use of equipment and facilities. • Follows departmental procedures and policies Uses initiative within standard operating procedures, advice available from supervisor or other senior staff. • Provides advice, information and guidance to patients, carers and relatives about appointments, clinics, admissions. Provides general advice, information, guidance or ancillary services directly to staff. • Misjudgement in responding to code protocols may impact safety.
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • Work is performed within guidance. Support is generally available from more senior or experienced employees
 <p>Leadership</p>	<ul style="list-style-type: none"> • May show others how to perform tasks or duties by familiarising others with the work area and processes.
 <p>Demands</p>	<ul style="list-style-type: none"> • The work involves working in emotionally demanding situations on an occasional basis. • Concentration required when checking information and when answering queries from staff, customers, public, patients; may be required to switch tasks to prioritise urgent activities. Frequent sensory effort with competing multiple sensory demands such as alarms, monitors and switchboard. Inputting at a keyboard, telephone equipment for most of the day • Office or similar conditions, occasional verbal aggression






Profile 2B

Key function of the role: Inputs and processes financial/purchasing/payroll information, completing routine transactions in accordance with procedures.

 <p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • Knowledge of a range of finance and procurement procedures acquired through training. On average it takes nine (9) months on the job to become familiar with the patient information system, and relevant policies and procedures. • Analyses financial data to identify errors and sorts out problems from a range of options. Makes complex calculations about payments and decides whether and how to pursue over/under payments. • Discusses queries from staff, customers and suppliers where there may be issues about non- payment, incorrect or late payments or other sensitive issues; communicates statutory financial and procurement regulations and DHB/govt rules in a simplified form to non-finance people, discusses complicated financial matters (for example concerning invoices and payments) • Plans workload to ensure weekly, monthly, quarterly and annual financial timetables met. • Standard keyboard skills (entering financial information)
 <p>Responsibilities</p>	<ul style="list-style-type: none"> • Inputs financial data into computerised and paper databases/systems; creates financial spreadsheets. • Requires careful use of equipment and facilities. May order supplies or stock • Follows departmental procedures and policies. Uses initiative within standard operating procedures, advice available from supervisor or other senior staff. • Provides non-clinical information or advice to patients or relatives • Improper data entry may result in inaccurate records which may delay services to consumers.
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • Work is performed within guidance. Support is generally available from more senior or experienced employees
 <p>Leadership</p>	<ul style="list-style-type: none"> • May show others how to perform tasks or duties by familiarising others with the work area and processes.
 <p>Demands</p>	<ul style="list-style-type: none"> • The work involves working in emotionally demanding situations on an occasional basis. • Concentration required when inputting data, checking and reconciling patient information and when answering queries from consumers/ may be required to switch tasks to prioritise urgent activities. • Work involves standard keyboard work and lifting, sorting, filing, general handling of paper records






Profile 2C

Key function of the role: Provides reception services.

 <p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • Knowledge of a range of patient administration systems and case notes procedures acquired through training. • On average it takes nine (9) months on the job to become familiar with the patient information system, and relevant policies and procedures. • Additional to own work area will require knowledge of workplace systems, departments, and personnel to appropriately advise and direct consumers. • Resolves problems for others (for example locating information, appointment issues) when responding to queries, escalating issues when necessary • Workload is allocated, organises own day to day tasks. Organises for consumers (for example patient transport, discharge, appointments, admissions) • Dealing with queries, checking patient information with staff and consumers. Communicates verbally and in writing, routine information with patients and staff (for example discharge, directions, appointments) Tact and diplomacy are required; there may be barriers to understanding for example anxious consumers, cultural differences, language or communication difficulties. • Standard keyboard skills (entering consumer information), manoeuvring notes trollies
 <p>Responsibilities</p>	<ul style="list-style-type: none"> • Updates, maintains, stores clinical or non-clinical records, appointment details. • Requires correct use of equipment and facilities. May order supplies or stock and/or take payments • Follows departmental procedures and policies. Uses initiative within standard operating procedures, advice available from supervisor or other senior staff. Provides non-clinical information or advice to patients or relatives • Improper data entry may result in inaccurate records which may delay services to consumers.
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • Responsible for the completion of regularly occurring tasks with general guidance. Support is always available from more senior or experienced employees.
 <p>Leadership</p>	<ul style="list-style-type: none"> • May show others how to perform tasks or duties by familiarising others with the work area and processes.
 <p>Demands</p>	<ul style="list-style-type: none"> • The work involves working in emotionally demanding situations on an occasional basis. • Concentration required when inputting data, checking and reconciling patient information and when answering queries from consumers/ may be required to switch tasks to prioritise urgent activities. • Work involves standard keyboard work and lifting, sorting, filing, general handling of case records. May include pushing trollies with patient notes. • Office or similar conditions frequent noise, occasional verbal and physical aggression; occasional exposure to body fluids






Profile 1A

Key function of the role: Enters records into information systems; generates standard reports.

 <p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • Knowledge of a range of databases and systems and related procedures acquired through training. • On average it takes six (6) months on the job to become familiar with the filing system, computer systems and relevant policies and procedures. • Workload is allocated, organises own day to day tasks • Has regular contact with staff and others requiring tact and discretion when checking with staff the accuracy of information. Standard keyboard skills (entering consumer information).
 <p>Responsibilities</p>	<ul style="list-style-type: none"> • Processes and stores patient data using a computerised system, files paper or scanned information within the case record in a retrievable format. • Requires correct use of equipment and facilities. • Mis-keyed records/reports may delay related services or incorrectly produced reports or have some financial impact
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • Responsible for the completion of regularly occurring tasks with general guidance. Support is always available from more senior or experienced employees.
 <p>Leadership</p>	<ul style="list-style-type: none"> • May show others how to perform tasks or duties by familiarising others with the work area and processes.
 <p>Demands</p>	<ul style="list-style-type: none"> • The work involves working in emotionally demanding situations on an occasional basis. • Concentration is required for data inputting, checking information and when answering enquiries. • Inputting into computer for a substantial proportion of working time. • Work involves standard keyboard work and lifting, sorting, filing. • Office or similar conditions; use of multiple systems or screens.






Profile 1B

Key function of the role: Initiates, retrieves and files case records, responds to routine requests for information.

 <p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • Knowledge of a range of patient administration systems and case notes procedures and some simple release of information processes within the organisation, acquired through training. • On average it takes six (6) months on the job to become familiar with the filing system, computer systems and relevant policies and procedures. • Investigates and tracks case notes. • Workload is allocated, organises own day to day tasks • Has regular contact with ward/clinic staff and others requiring tact and discretion when discussing health record issues. • Standard keyboard skills (entering information accurately), manoeuvring notes trollies
 <p>Responsibilities</p>	<ul style="list-style-type: none"> • Processes and stores patient data using a computerised system, files paper or scanned information within the case record in a retrievable format. • Requires correct use of equipment and facilities. • Performs routine release of files and records following standard operating procedure and legislative requirements and under supervision. Deals with enquiries, advice and guidance available from line manager. • Misfiled health records/reports may delay related services.
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • Responsible for the completion of regularly occurring tasks with general guidance. Support is always available from more senior or experienced employees.
 <p>Leadership</p>	<ul style="list-style-type: none"> • May show others how to perform tasks or duties by familiarising others with the work area and processes.
 <p>Demands</p>	<ul style="list-style-type: none"> • The work involves working in emotionally demanding situations on an occasional basis. • Concentration is required for data inputting, checking information and when answering enquiries • Work involves standard keyboard work and lifting, sorting, filing, general handling of case records. May include pushing trollies with patient notes. Office or similar conditions/ dusty conditions in archive storage areas

Clinical Coder Profile

Key function of the role: Analysing clinical records and translating statements into health classification codes

 <p>Skills & Knowledge</p>	<p>Guidance:</p> <ul style="list-style-type: none"> o Clinical coding profile should only be allocated to roles in clinical coding teams and within the HIMMA accreditation framework <ul style="list-style-type: none"> • Knowledge of computer use, coding procedures & conventions; knowledge of medical terminology, anatomical and physiological terms; acquired through work-based training, Accredited Clinical Coder qualification through HIMAA. • Abstracting and analyse complex patient clinical records; use judgement to translate cases where the procedure undertaken not readily codable, application of clinical coding conventions. Cases allocated by supervisor or manager. Issues regarding interpretation may require problem solving. • Communicate complex coding rules to medical, clinical and administrative staff and external agencies. Requires appropriate tact when interacting and discussing issues with other departments. Has regular contact with clinicians. • Keyboards skills for regular use of computer systems.
 <p>Responsibilities</p>	<ul style="list-style-type: none"> • Implements agreed local variations to coding rules, comments on proposed changes. • Process and codify patients' case notes, test results. May participate in audits. • Provide general advice, information, guidance or training directly to clinical staff.
 <p>Accountabilities</p>	<ul style="list-style-type: none"> • Discretion is applied when applying known practices, processes, and procedures. Whilst support is generally available from more senior or experienced employees this is not usually required daily.
 <p>Leadership</p>	<ul style="list-style-type: none"> • Provides occasional guidance to the primary function of others, including training. Provides functional guidance and/or specialty advice to clinical staff. Acts as mentor for less experienced coding officers.
 <p>Demands</p>	<ul style="list-style-type: none"> • Occasional exposure to distressing circumstances (for example staff issues or dealing with complaints from or distressed consumers or stakeholders) Regular sensory effort requiring concentration on computer work and report writing/editing with periods of competing multiple sensory demands. • Regular physical effort such as lifting, walking and standing with regular computer operation/keyboarding requiring accurate coordination of fine motor skills. • Occasional exposure to minor conditions such as verbal abuse, interruptions and multiple deadlines with some travel.