
All District Health Boards



National Health Administration Workers Pay System

Operational Guidelines (Extract) – Continuums of Administration Work

Appendix 3 – Continuums of Administration Work

The following tables are to help with decisions on which role profile may be appropriate. These tables are not prescriptive.

People Working in People & Capability: High Level Continuum

Team Administrator in People and Capability or Recruitment team	Team Support to People and Capability or Recruitment Team	Information Coordination People and Capability or Recruitment team	HR Adviser / Recruitment Advisor	HR Consultant
Likely Profile: Profile 3C	Likely Profile: Profile 4A	Likely Profile: Profile 5D	Out of scope	Out of scope
<p>Responds to routine enquiries to employed staff and people applying for roles.</p> <p>Compiles HR information on e.g. recruitment, workforce central (time card system).</p> <p>Enters or updates employee data to HR systems.</p> <p>Responds to routine enquires. Types/processes standard documents</p>	<p>Provides administrative service to the HR Team</p> <p>Co-ordinate activities which include multi-disciplinary meetings, disciplinary meetings, training programmes, workforce planning</p> <p>Supports ordering of supplies for HR team</p>	<p>Coordinates information across a range of sources to support HR processes.</p> <p>Providing information to support recruitment including credentialing and checking against professional registers.</p>	<p>Provides advice and support to line managers and employees across a range of HR services e.g. recruitment, ER, workforce planning, absence management</p> <p>Delivers HR training and staff development courses</p> <p>May have specialist knowledge of an area, e.g. SMOs, workforce planning, recruitment</p> <p>Provides and delivers training on HR policies and procedures</p> <p>Requires HR qualification or domain specific experience</p>	<p>Provides advice and support to line managers and employees across a range of HR services e.g. recruitment, ER, workforce planning, absence management</p> <p>Supports Disciplinary meetings.</p> <p>Provides advice for change processes.</p> <p>Provides and delivers training on HR policies and procedures</p> <p>Requires HR qualification or domain specific experience</p>

IT: High Level Continuum

Note: The service desk function is not an administration role.

Data Entry	Database owner	IT Technician
<p>Likely Profile: Profile 1A</p>	<p>Likely Profile: Profile 3E</p>	<p>Out of scope</p>
<p>Inputs and processes information in accordance with procedures</p> <p>Responds to routine enquiries</p> <p>Works on audits as required as part of own work</p>	<p>Maintains quality and content of data held within information systems</p> <p>Supports analytical work of business area</p> <p>Inputs and processes information in accordance with procedures</p> <p>Responds to enquiries from customers and data providers</p>	<p>Ensures a range of ICT information is processed in accordance with policies and procedures</p> <p>Investigates a range of IM&T issues as highlighted by users. Suggests fixes to the vendor/</p> <p>May advise staff/customers on systems / policy</p> <p>Modification or creation of aspects of information systems or hardware. For example, changing modules within a reporting system upgrading software</p> <p>Design of health-related data sets and information</p>

People and Functional Leadership: High Level Continuum

Team Supervisor / Technical Specialist Leadership	Line management leadership/ Functional Leadership		Operations Manager/Service Manager (could include some Team Leaders)
Likely Profile: Profile 6B	Likely Profile: Profile 7A	Likely Profile: Profile 7A	Out of scope
<p>Role has limited (approving leave) or no HR and finance delegations</p> <p>Is accountable for the day-to-day work of others in a single function and for making sure others are trained to a specific standard.</p> <p>Whilst support is generally available from more senior or experienced employees not usually required.</p>	<p>Full-time, direct accountability/responsibility for leadership of more than one staff member in work assignments or coordination/direction of groups on an ongoing basis in a single or group of administration function(s) or functional leadership.</p> <p>This is generally full-time supervision, responsible for allocation, direction and monitoring of work while exercising team leadership and coaching skills.</p> <p>Holds a delegated budget/responsible for purchase of physical assets/authorises financial payments.</p> <p>Accountable for the work produced by the team in relation to the quality and timeliness</p> <p>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> <p>Leads on service development for their specialist area, developing and implementing policy for that area, proposes changes in conjunction with working groups which have wider impact.</p>	<p>Leadership of a key function or area of technical specialisation.</p> <p>Has direct accountability /responsibility of an administrative function co-ordination/direction of groups on an ongoing basis. The team members will not necessarily be direct reports , but this role will have significant influencing and education role for internal and external parties. Provides professional / expertise leadership to staff including staff who are more senior or who have other roles.</p>	<p>Provides operational management support to a service(s)/directorate across a range of functions and delegated authorities.</p> <p>Implements business plans, projects, change initiatives</p> <p>Carries out business performance monitoring and reports. Prepare and present reporting and recommend options for improvement.</p> <p>Line management of members of the operational team including activities such as recruitment, selection, work planning, allocating and delegating activities, and reviewing performance and achievement of targets</p> <p>Monitor or contribute to the drawing up of service budgets(s) or financial initiative</p> <p>Plans operational activities or programmes of work which impact across or within service(s)</p>

Warehouse To Contract: High Level Continuum

Distribution	Warehouse Clerk	Stores /Imprest Clerk	Procurement Administrative Officer	Procurement Specialist / Contracts Manager
Out of scope	Likely Profile: Profile 1A Could be: Profile 2B	Likely Profile: Profile 3C	Likely Profile: Profile 4A Could be: Profile 5C or 6D	Out of scope
<p>Majority of the role fulfilment turning, picking, packing, delivery and stacking.</p> <p>Any role with administrative duties around warehouse activities please review the administration profiles for best fit.</p>	<p>Receive deliveries from suppliers; to check deliveries against the purchase order details, sign for and receipt goods on the System.</p> <p>Ensure non-stock deliveries are placed in a designated area.</p> <p>Assist with keeping the Receipts and Despatch areas tidy and organised.</p> <p>Have ready supplier returns for planned collection dates.</p> <p>Assist with the movement and collection of packages/pallets/tote bins/roll cages to/from user departments.</p> <p>May do some driving as a part of their role.</p> <p>More advanced role includes the updating of catalogues.</p>	<p>Provides internal supply chain services e.g. receipts, distribution and/or materials management using computerised receipts, storage and/or bar-coded data capture systems.</p> <p>Unpacks and checks delivered items against delivery/order information, takes corrective action, maintains audit records.</p> <p>May hold and store ward/department stock records and replenish products in accordance with agreed procedures.</p> <p>Liaises with internal personnel and external suppliers on supplies/stock management/rationalisation /delivery- related issues.</p> <p>May do some driving as a part of their role.</p>	<p>Processes orders, organises high value quotes and low value contracts</p> <p>Liaises with suppliers to encourage them to meet organisational purchasing needs and persuades customers to use contract arrangements</p> <p>Investigates and solves supply related problems for example deliveries, invoices</p> <p>Applies operational policy and proposes innovation or service improvement</p> <p>More advanced role includes resolving complex procurement problems, sometimes involving specialist knowledge of clinical procedure supply needs with discretion to spend significant amounts.</p>	<p>Develops, coordinates and delivers a cost-effective purchasing/contracts work plan to achieve financial targets</p> <p>Advises users, budget holders on procurement policies and procedures</p> <p>Undertakes purchasing activity and organises medium/high value contracts</p> <p>explains detailed purchasing/contractual issues, including relevant regulations with both staff and suppliers/ Negotiates contractual issues</p> <p>Introduces new purchasing policies and practices</p>

Payroll Team: High Level Continuum

Work related expenses Payments	Payroll Officer	Payroll Helpdesk	Payroll Specialist	Payroll Team Leader or Technical Specialist	Payroll Manager
Likely Profile: Profile 3D	Likely Profile: Profile 3A	Likely Profile: Profile 4A Could be: Profile 5D	Likely Profile: Profile 6D	Likely Profile: Profile 7A	Out of scope
<p>Inputs and processes employee information, completing routine payroll transactions in accordance with procedures.</p> <p>Works within a narrow function of the payroll team for example WRE coordination.</p>	<p>Inputs and processes payroll information, completing routine financial transactions in accordance with procedures.</p> <p>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.</p> <p>Regular requirement to develop or create reports, documents. Prepares payroll for approval and payment.</p> <p>Responds to routine enquiries from staff investigates queries as required.</p>	<p>Analyses, investigates, and resolves payroll queries and discrepancies.</p> <p>Discusses payroll queries with staff, suppliers, customers, which are often complex, including reasons for delays in pay and other sensitive issues like overpayment; provides advice on complex payroll issues to HR advisors.</p>	<p>Follows and interprets accepted practices, existing rules and regulations regarding payroll matters.</p> <p>Develops plans associated with changes to legislation or industrial instruments coordinating workflow for the team.</p> <p>Uses a variety of methods to analyse and troubleshoot payroll problems to achieve the desired outcome.</p> <p>Proposes changes to working practices and procedures (for example when planning for the impact of new legislation) Is a technical specialist in an specific area of payroll.</p>	<p>Leads a team of payroll staff or has a functional leadership role in areas of technical specialisation.</p> <p>Ensures payroll information is processed in accordance with procedures and in order to provide information for statutory returns.</p> <p>Investigates enquiries, providing assistance and advice as required.</p> <p>Ensures that work is completed in line with financial timescales and legal requirements</p>	<p>Responsible for the overall management and performance of a payroll service.</p>

Quality Roles: High Level Continuum

Data Integrity	Release of Information	Training / Quality of administration function	Quality Coordinator
Likely Profile: Profile 3E	Likely Profile: Profile 5D	Likely Profile: Profile 6B	Out of scope
<p>Checks with staff the accuracy of patient/other information held on record.</p> <p>Provide a high standard of data collection and entry, this may include working within a variety of web-based platforms.</p> <p>Assist in the collection and collation of data and statistics as required for audit</p> <p>Complete paperwork in relation to any discrepancies that occur within the administration system.</p>	<p>Manage and monitor all incoming requests for information under the Official Information Act/Privacy Act etc.</p> <p>Disclosure of information in accordance with current legislation.</p> <p>Liaise with the legal service to gain advice and guidance.</p>	<p>Supporting a team to maintain quality in an administration function.</p> <p>Provides training or audit function for an administration function by demonstrating or, explaining practices and procedures to new, less experienced staff.</p> <p>Develop training programmes for administration staff as major job responsibility.</p>	<p>Completes investigations as a result of clinical incidents</p> <p>Analyse complaints or incidents and make recommendations for action.</p> <p>Jobs involving the registration, inspection or quality assurance of facilities/services for patients/clients</p>

A note about quality: Quality is a key aspect of all jobs as everyone is responsible for the quality of their own work.

All employees should take personal responsibility to take the time to check the quality of their work and ask for feedback from team members to help them improve. They are responsible for improving the quality of their own work and help to resolve problems in their area. It is also expected that they report any concerns around practice issues or work standards to a manager or supervisor.

Project Roles: High Level Continuum

Project Support	Project Coordinator	Project Manager
<p>Likely profile Profile 3C</p>	<p>Likely Profile Profile 4A Could be Profile 5C or 6D</p>	<p>Out of scope</p>
<p>Provides administrative support to the manager of a specific project</p> <p>Acts as the first point of contact for enquiries.</p> <p>Maintains project documentation, database, enters project data</p> <p>Organises rotas and meetings, plans presentations/coordinates multi-disciplinary meetings</p>	<p>Provides administrative support to the manager (and team) of a specific project – might be more than one project.</p> <p>Develops and maintains project documentation, database, resources</p> <p>Assists the project manager in the development and preparation of the overall project plan, plans key workstreams in relation to the project</p> <p>Orders supplies for project team</p> <p>More advanced role reflects size and complexity of project, range and breadth of coordination and cost / investment.</p>	<p>Manages all of, or elements of, a large project. Accountable for the deliverables.</p> <p>Supports, facilitates and monitors progress of project within or across site(s)</p> <p>Supports performance improvement</p> <p>Project Budget Holder</p>

Bookings and Appointments Roles: High Level Continuum (all in Scope)

Referrals Data Entry	Receptionist	Medical Secretary	Scheduler Relievers	Schedulers
Likely Profile Profile 1A Could be: Profile 3C	Likely Profile Profile 2C Could be Profile 3C	Likely Profile Profile 4A	Likely Profile Profile 5B	Likely Profile Profile 5B
<p>Loading of referrals into the patient management system.</p> <p>Processing for declined referrals.</p> <p>Sending referrals in preparation for Doctors to triage.</p>	<p>Collecting and recording information at the point of entry into the hospital system including the patient management system.</p> <p>Checking and preparing clinic lists and 'pockets'</p> <p>Greets patients/public to department/facility – redirect 'lost' patients</p> <p>Confirm patient demographics</p> <p>Appointment processes</p> <p>Book follow up appointment from available appointment grid</p> <p>Process DNAs</p>	<p>Providing a range of administrative support to a service or clinical team.</p> <p>Includes some of the following: Making appointments for patients to attend clinics Responding to requests to cancel or change bookings Setting up clinics and preparing clinic information Entering all data into the patient management system accurately and in a timely manner</p>	<p>Key function of the role is allocating patients to clinic appointments or surgical lists based on regulated timelines and other criteria including clinical presentation and urgency. This involves scheduling from a waitlist and problem solving when all conditions cannot be met easily.</p> <p>Reviewing triaged referrals for waitlisting. Following-up post-clinic tasks and completing coding – includes follow up/discharge of non-attenders (DNA) Managing/reviewing patient wait-lists. Filling vacant appointment spaces to ensure an efficient flow of patients through all clinics. Rebooking of clinics for unplanned leave</p>	<p>Key function of the role is allocating patients to clinic appointments or surgical lists based on regulated timelines and other criteria including clinical presentation and urgency. This involves scheduling from a waitlist and problem solving when all conditions cannot be met easily.</p> <p>Reviewing triaged referrals for waitlisting. Following-up post-clinic tasks and completing coding – includes follow up/discharge of non-attenders (DNA) Filling vacant appointment spaces to ensure an efficient flow of patients through all clinics. Providing statistical waiting list figures to Service Manager or others as required Schedule maintenance (e.g. updating for leave, new clinicians, new types of list or template), rebooking of clinics for unplanned leave</p>

Note: If scheduling activities which match the scheduling national profile are more than 70% of the role then use the scheduler profile

Continuum Of Work Across The Administration Role Profiles

Data Entry	General Administration	Team/Service Administration	Business (Executive) Administration	Administration Functional Leadership
Likely Profile Profile 1A Could be: Profile 3C	Likely Profile Profile 3C	Likely Profile Profile 4A	Likely Profile Profile 5D or 5E Could be: Profile 6B or 7A	Likely profile 6B Could be: Profile 7A
Requires knowledge of a narrow scope of routine procedures.	Requires knowledge of a range of routine procedures.	Requires knowledge of the relevant procedures, plus knowledge of how to deal with related non-routine activities, such as answering queries, progress chasing, task-related problem solving.	Requires knowledge of all the relevant administrative procedures, plus knowledge of how to deal with a range of non-routine activities, such as work allocation, problem solving for a area of work, as well as answering queries and progress chasing, developing alternative or additional procedures.	Is a technical specialist/business expert.
Works within clear guidelines. Generally, works with supervision close by and within well established procedures and/or practices and has standards and results to be achieved.		Work is managed rather than supervised. Is guided by standard operating procedures (SOPs), good practice, established precedents and understands what results or standards are to be achieved.		Work is providing leadership in a functional or technical area. Establishing SOPs and good practice and setting standards.
Required to follow well defined procedures and do not generally deviate from these without seeking advice.	Is guided by standard operating procedures (SOPs), good practice and established precedents and always has access to someone to refer to when things go outside of these guidelines.	Can make decisions independently within established guidelines and can seek support outside of these.	Required to act independently within appropriate guidelines, deciding when it is necessary to refer to their manager.	Required to act independently and to take the initiative in setting the work plans and key results.
Organises own day-to-day work tasks or activities.		Planning and organisation of straightforward tasks, activities, or programmes, some of which may be ongoing.	Planning and organisation of a number of complex activities or programmes, which require the formulation and adjustment of plans.	Planning and organisation of a number of complex activities or

		For example, compiling straightforward staff rotas, arranging meetings for others, planning administrative work around committee meeting cycles.	For example, work planning, where there is a need to allocate and re-allocate tasks, situations or staff on a daily basis to meet organisational/senior leader/project requirements. It also includes the skills required for co-coordinating activities with other professionals and stakeholders where a substantial amount of detailed planning is required	programmes, which require the formulation and adjustment of plans. Supporting others to plan and report these activities
May show others how to perform tasks or duties by familiarising others with the work area and processes	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, department, or service processes).	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 Coordinates work on behalf of a more senior manager.	Coordinates work on behalf of a more senior manager. Supports others to understand/interpret standards.	