Steinberg
Consulting Services, Inc.

Office Manager Job Description

Hiring Resource

Accounting and Stats

- Direct and compile all production stats by provider and by department
- Make weekly bank deposit
- Verify hours reported for al hourly or commissioned employees for payroll purposes
- Enter figures into payroll program
- Do PR from QB
- Populate AP and daily deposits into QB
- IP accounting (need some clarification on this)
- Reconcile QB with bank statements (?)
- Prepare excise tax returns (?)

Admin: Office communications

- Maintain and update all procedural manuals for all positions
- Maintain and update all employee policy documents
- Schedule, attend and record all office meetings on or off site
- Create and maintain intra office communication tools (google groups, group e-mail, etc.)
- Create and maintain HIPAA compliance manual, including self-audit now required.

IT

- Create and maintain vendor relationships with both hardware /network company and with software vendors, especially PMS software
- Create and maintain IT equipment list: date of purchase, size of storage, expected replacement date
- Create list of passwords for each machine and for all levels of security for software.
- Verify and test (with IT vendor) both onsite and offsite backup and restore systems.

HR/admin

- Create job advertising for all positions.
- Post ads on craigslist and/or Indeed as necessary due to growth or turnover.
- Screen and interview candidates.
- Complete hiring process with standard forms (w-4, I-9, background check permission, confidentiality agreement, policy manual, acknowledgement of procedural manual)
- Deliver periodic reviews
- Review pay parameters and make recommendations to clinic owner
- Deliver hands on training for basic and repeated procedures
- Cross train as indicated.
- Deliver necessary disciplinary action including termination
- Maintain employee files
- Scheduling including vacation and coverage as necessary

HR/professional

- Create necessary job advertising, post and screen.
- Hire with offer letter, and standard forms (w-4, I-9, background check permission, confidentiality agreement, policy manual, acknowledgement of procedural manual)
- Coordinate credentialing with payers for inclusion of new professional person's NPI number into group NPI number and business tax ID number and address.
- Coordinate training with clinic director or department head.
- Coordinate QA with clinic director
- Deliver reviews and recommend pay modification if indicated. Therapist and admin.
- Scheduling for all providers including vacation
- Coordinate with providers regarding online purchases
- EHR coordination
- Marketing all services to outside entities
- Overseeing ND notes, and other QA
- Dr. interfaces
- Manage LMPs.

Vendors

- Create and maintain list of all current suppliers separated by office supplies, clinical supplies (disposable) and resale/retail items. List should include web address, password if any, phone number if applicable and contact person if applicable
- Create and maintain procedures and methods of inspecting output of billing vendor.
- Report to clinic director on a weekly basis regarding missing or incorrect data, discrepancies, problem accounts, etc.

Inventory

- Create system in the office where we are never using the last box or case of something. There should be the one in use and the one in reserve.
- Task users of supplies to notify you when we are on the last case or container of supply
- Ideal setup is a three-month supply of all disposable supplies if storage space allows.
- Retail inventory (we need a separate discussion about this)

Operations

- Create and maintain a list of all electro-mechanical supplies and small equipment. Date purchased, type, etc. This includes phones, printers, hand held devices and any other not computer network clerical equipment in the office.
- Create and maintain a list of any clinical equipment vendors or maintenance people, including tables, adjusting instruments, radiology, clinical lab, etc.
- Décor and cleanliness for the office.
- Emergency management in clinic director's absence.

Marketing

- Coordinate and publish content created by providers onto all social media platforms
- Compile, edit and post quarterly newsletter
- Organize and deliver 4 annual community marketing events
- Organize and assist with in-person marketing meetings for local providers.
- Send PCP reports for mutual patients
- Populates and maintains website
- Marketing event planning and attendance

Example of General Daily/Weekly/Monthly Task List:

- ✓ New Patient list printed- go through and mark which Dr. they saw, how they heard about us, if their insurance is entered/billed and put in binder
- ✓ Input New Patients into Vista Print
- ✓ Input New Patients into Dr. Steinberg's report
- ✓ Email team leader which referrals came from outside providers for follow up reports
- ✓ Send thank you's to provider/attorney referrals
- ✓ Confirm all data for new patients has been entered from previous week
- ✓ Enter patient stats into Dr. Steinberg's compliance report
- ✓ Check Demand Force for reviews and reply
- ✓ Audit Chart notes and charges from day before
- ✓ Blast emails and newsletters from Demand Force
- ✓ Meeting notes: any actions of mine
- ✓ Website Events calendar, update and promote
- ✓ Order any supplies needed
- ✓ Social Media stats- emailed to all team leaders
- ✓ Payroll 11th\26th, write any lunches not on log and scan into folder
- ✓ Email the following and reports to Dr. Steinberg on a monthly basis: Gross Payroll for all providers (excluding massage)(do not include bonuses for NDs/Providers), retail sales amount, collections, services, write offs (do Britt and Connor separately. Include Dr. Harlow in collections, also include new patients and returning patients for PTs
- ✓ Steinberg: Monthly New Patient Report, emailed
- ✓ Steinberg: Client Compliance report, emailed
- ✓ Steinberg: Client Massage Annual Report, emailed
- ✓ Steinberg: both ND reports: use Procedure Code Usage report to find totals for services separately and use service provider monthly charges and collections for collections and write offs. can use the procedure code usage to find supplement bonuses. Emailed.
- ✓ Steinberg: send CT report: the payment details linked to other transactions report includes payments that are not included on the other reports, emailed and the unapplied payments report
- ✓ Steinberg: email staff bonus report
- ✓ Steinberg: email the patient and payor AR from CT
- ✓ Email billing patient and payor AR (in excel form)
- ✓ Email Front Desk and Dr. recall list
- ✓ Patient of the month/ T-shirt draw for gift card
- ✓ Order T-shirts for promo when needed
- ✓ Marketing: Attorney List
- ✓ Marketing: Vendor List
- ✓ Marketing: PCP List
- ✓ Marketing: Google: Check Dr. for reviews and reply
- ✓ Marketing: Google Adwords
- ✓ Marketing: Google Analytics
- ✓ Marketing: Yelp
- ✓ Marketing: Facebook/ Twitter
- ✓ Marketing: Instagram
- ✓ Marketing: Youtube
- ✓ Marketing: Look for local events/ health talk opportunities
- ✓ Check outlook calendar for future events
- ✓ Indeed: Check for resumes/ads.
- ✓ Chirotouch updates and training videos
- ✓ Team Building Event ideas: July 28th boat cruise
- ✓ Vista Print: refill any current marketing or create new
- ✓ Check in staff, see what is needed
- ✓ Set up quarterly potlucks with office
- ✓ Reach out to on hold concepts to update our waiting message