

BUILDING AND EDITING JOB DESCRIPTIONS

The heart of EmTrak is in the customized job descriptions. I will also admit that this is where the real work comes in. It is off these descriptions that all of the evaluations in EmTrak are driven: annual evaluations, periodic evaluations, coaching documents. Job descriptions also impact the coaching suggestions available – the real foundation of EmTrak 3.1.

Your ability to create a customized job description provides a direct link between the job description and the evaluations, since the evaluations are based specifically on what you choose for the job descriptions. Accrediting bodies require that performance plans and evaluations be tied directly to job descriptions and, in fact, research suggests that the only valid approach to evaluation is to be specific, not generic.

Key Point:

In a moment I will take you through the process of creating a job description. There will be numerous possible tasks for any position. I created EmTrak by going through job descriptions from several of our best companies – it ended up being at least 8 different job descriptions for every type of job, often more, literally hundreds of different tasks and elements. What I considered was the fact that a driver tech in one company has an entirely different job than a driver tech in another company. However, working through these job descriptions, I was able to come up with a list of tasks from which you could select and cover almost any driver tech in any company (or any billing person or manager or administrative assistant). I took each task and defined those tasks specifically in the bullet points that accompany them. Those bullet points are detailed and are designed almost as a best practices guide.

We get to it later, but the final step was creating some coaching suggestions for every task, some ideas on how you could help an employee improve in any area you choose.

The Summary: What I tried to do was come up with all of the possible tasks someone might do in a position – however, I don't think that there can be anytime when someone does every task listed. EmTrak is specifically meant for you to pick and choose what is relevant.

In a moment I am going to show you how to create a job description for an Administrative Assistant. You will build the description by selecting individual tasks. I am going to show you how to build it on-line, but the actual first step will be to print out the Word document specific to that job (or the combination of jobs).

[Building the Job Description in the Word document](#)

This is a simple document you can print out so that you or any other managers at the company can build the job description first on paper. (You will find a link on this CD for those Word documents entitled **ALL JOB DESCRIPTIONS IN WORD FORMAT**). They (or you) can simply check off the tasks they think should be part of the job. In addition, you can make changes for EACH bullet point, scratching out words or entire bullet points they don't need, rewording them as they need them. This is a new feature in EmTrak we will discuss in a minute – FULLY customizable job descriptions, down to even the individual bullet points.

Employee Name:
Job Title:

Manager:
Dept:

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[This form is the first step for building a job description in EmTrak. Please put a check in the box next to the tasks that are appropriate for this employee. The next step will be to build the job description on-line or send it to HR to build on-line.

Are there tasks that don't appear or you're not sure what to select? Contact your HR Director or CEO or Dr. Gary Schwantz at gschwantz@medgroup.com

ADMINISTRATIVE ASSISTANT

ESSENTIAL TASKS

Office Machines & Data Entry

- Efficiently use the computer and software appropriate for this position.
- Efficiently operate all office machines appropriate for this position.
- Use equipment in an ergonomically correct manner.
- Fully understand and utilize the appropriate computer systems to input data and maintain computer files as needed.

Records Management

- Assist in the smooth flow of paperwork and information within the office.
- Create and alphabetize file folders.
- File documents accurately.
- Collect and distribute appropriate records as needed.
- Pull inactive files for storage. When appropriate, dispose of documents by shredding or other appropriate means.
- As needed, organize and scan documents, make certain hard documents are stored correctly, and pull up scanned images.

Correspondence

- Type and print correspondence as necessary
- Handle incoming and outgoing mail and faxes efficiently, routing to the proper channels
- Copy, collate, and assemble literature as required

Scheduling

- Maintain staff calendars/scheduling – keep records of appointments and meetings and notify appropriate staff of changes.

VERY IMPORTANT POINT COMING:

Here is a strong recommendation, one I hope you will pay close attention to. Rather than simply making your changes in pencil on the Word document and then making all the changes on –line, instead do it all in the Word document. Open this Word document and make your changes in the document, bullet point by bullet point. If there are tasks you aren't going to use, then delete them from the Word document. Create your total job description as a Word document, two reasons:

1. Reason #1 – all you will need to do when you create the job description on-line is point and click, paste and copy (that will make more sense in a moment)
2. Reason #2 – since EmTrak is an on-line program, there are at times interruptions in a network or a bug that pops up. If you build this job description as a Word document and save, then create it on-line, your risk is minimized. Let's say you are building a job description for a warehouse tech and you lose your connection. It's possible that your work wasn't saved or lost, but if you have the Word document, simply re-open and start again.

This may seem like an extra step, but the fact is, you could save significant time by doing this first.

Once you have this document in hand, then it is easy to start building the job description on-line.

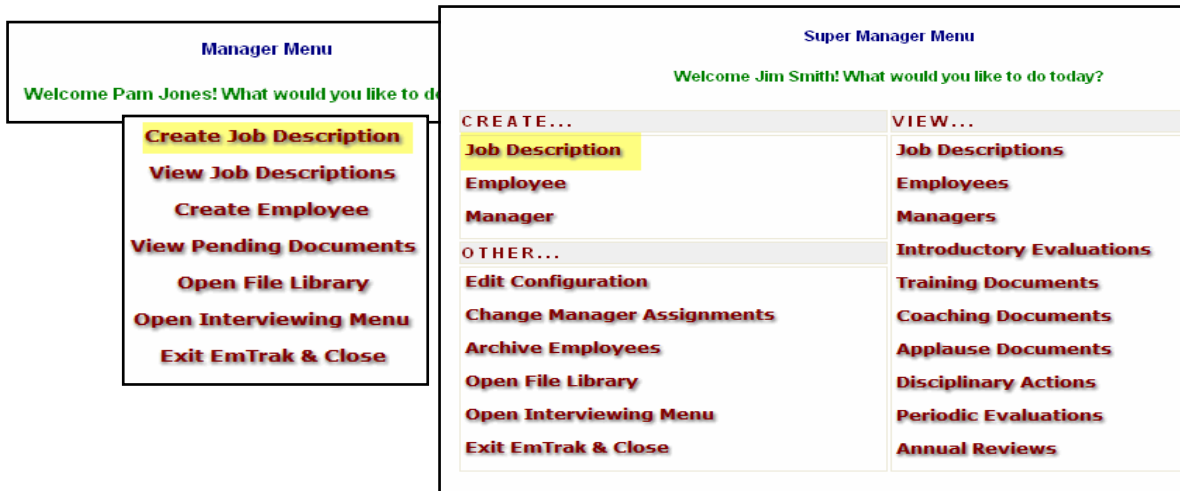
Each task you choose defines upon what issues that employee will be evaluated. You will come upon tasks that you know are part of their job at times and will wonder whether you should include it. There are two reasons to include a task:

1. they spend a significant amount of their time doing that job
2. the task is so important that the employee needs to be evaluated based on that job.

If you don't have a clear answer, my encouragement is not to include the task. Questions? Call me at 800.825.5633 or email me at gschwartz@medgroup.com

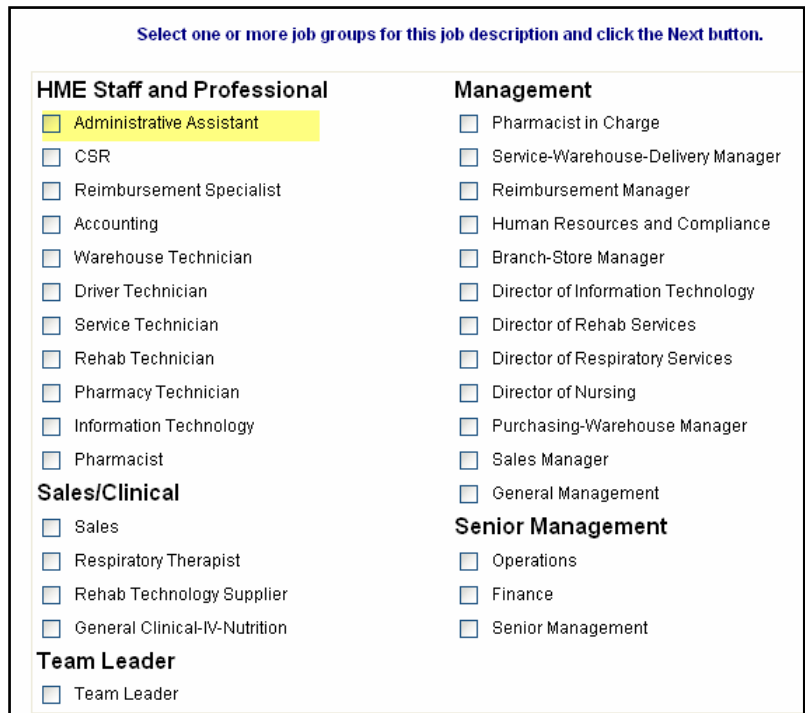
Building the Job Description On-line – Essential Tasks and Key Skills and Attributes

Let’s build a description for an Administrative Assistant in our Sales department. What you will notice is that we will pull up a long list of possible tasks and attributes for this position. EmTrak 3.1 recognizes that an Administrative Assistant (or any other position) may do a variety of tasks and will have a job description completely different from another administrative assistant in your company. For EmTrak 3.1, we examined hundreds of job descriptions from several companies within the MED Group, all to come up with a common foundation of tasks for you to build these descriptions. They are among the most thorough you will ever find. Enter your menu and click on **CREATE JOB DESCRIPTION**.



EmTrak will bring up a list of job description templates. Let’s build that job description of an Administrative Assistant in the Sales department. Follow us as we choose the tasks that are specific to this job, and only those tasks. If we were building the job for an Administrative Assistant in Billing, it might be an almost entirely different job description.

**Click on Administrative Assistant.
Click on NEXT.**



Here's the page that comes up. It is a list of all the possible tasks for an Administrative Assistant. Keep in mind, you are only going to select the ones that are relevant to this job, for this person

Check All Items – EmTrak is defaulted to this setting. That means that ALL tasks are automatically chosen. When a task is not appropriate, then you deselect it by clicking on that task. You can choose Uncheck All Items and then select that way instead.

Now start choosing the tasks this person does (or will do for this job) by checking or unchecking the box. First, we are going to select the Essential Tasks for this position – what they do on a daily basis. As we choose, we will select tasks specific to this position in marketing. For example, since this is an Administrative Assistant for Sales, then we know phone skills and customer service are critical. However, we don't use this person as a receptionist or to monitor office supplies. Someone else does that in our company. Therefore, task by task, we will choose only those Essential Tasks specific to this person.

Select Essential Tasks and Key Skills and Attributes, then click the Next button.

Check All Items Uncheck All Items

Essential Tasks (what they do):

- Administrative Assistant -- Office Machines and Data Entry**
 - Efficiently use the computer and software appropriate for this position.
 - Efficiently operate all office machines appropriate for this position.
 - Use equipment in an ergonomically correct manner.
 - Fully understand and utilize the appropriate computer systems to input data and maintain computer files as needed.

- Administrative Assistant -- Records Management**
 - Assist in the smooth flow of paperwork and information within the office.
 - Create and alphabetize file folders.
 - File documents accurately.
 - Collect and distribute appropriate records as needed.
 - Pull inactive files for storage. When appropriate, dispose of documents by shredding or other appropriate means.
 - As needed, organize and scan documents, make certain hard documents are stored correctly, and pull up scanned images.

- Administrative Assistant -- Phone Skills**
 - Answer phones by the third ring, using all features of the phone effectively and using "hold" only for short times and with good follow up.
 - Speak clearly and provide excellent customer service over the phone, through tone and style, assisting customers directly when appropriate and at other times routing incoming calls to the appropriate member.
 - Write down messages accurately or politely direct callers to voice mail, when appropriate.

- Administrative Assistant -- Receptionist Skills**
 - Greet visitors immediately upon arrival with excellent customer service through tone and body language.
 - Assist visitors as needed, including directing them to the appropriate team member. This includes an understanding of whom to direct customer needs.

- Administrative Assistant -- Customer Service**
 - Ensure compassionate and positive interactions with customers.
 - Offer clear, pleasant and professional communication to customers.
 - Provide skilled responses to grieving, upset or difficult customers.
 - Maintain proper confidentiality at all times when responding to customers.
 - Exhibit excellent verbal and written communication skills.

- Administrative Assistant -- Office Supplies**
 - Report any low levels of inventory or office supplies to the appropriate person.
 - As needed, assist in ordering and stocking office supplies. Track office supply usage as needed or directed.

Question: What if this person sometimes serves as a receptionist? Should we choose this as a task?

Answer: It depends. If they only fill in sporadically, then I wouldn't. My encouragement is to select those tasks that they either do on a daily basis or that are critical to this position. Remember that every task you choose then populates their annual review.

The other part of any job description is the list of Key Skills and Attributes (often called Behavioral Traits). Once again, you will select those you think are relevant to this position. Even though all of these Key Skills and Attributes are probably a part of their job, as a company you may decide you don't want every element included, simply to keep the size of the job description and the number of elements upon which they are evaluated reasonable.

Key Skills and Attributes (how they do it):

HME Staff and Professional -- Professional Approach

- Display on time attendance and dependability.
- Maintain the company's image and reputation at the highest possible level.
- Conduct oneself in a professional and ethical manner at all time, including personal appearance and appearance of the workplace.
- Maintain a neat appearance. Wear a name badge as required or requested.

HME Staff and Professional -- Confidentiality and Compliance

- Treat all information and data within the scope of the position with appropriate confidentiality and security.
- Understand and practice the rules regarding patient confidentiality, HIPAA and compliance, and safety. Adhere to all state and federally mandated standards regarding confidentiality and patient rights.

HME Staff and Professional -- Poise

- Display good common sense when faced with new or unfamiliar situations.
- Maintain a cool head when crisis situations occur.
- Deal effectively with stress.

HME Staff and Professional -- Relating to Others in the Workplace

- Positively resolve conflict situations.
- Provide input to management to improve workplace function.
- Take initiative to improve processes and communication in the workplace.



At the bottom of the page, click on the **NEXT** button.

Building the Job Description On-line – Job Title, Department, Qualifications, Essential Performance

A new page will come up. It offers blanks to name the job, offers overviews and qualifications, lists all of the tasks you have chosen, then at the bottom you can determine what you require as an orientation for the job.

Job Title & Department. - So, let's start at the top. Let's give this job a name and assign them a department. We will call the job Administrative Assistant and assign it to the Sales department. In the job title, go ahead and type the word Sales first. This is a simple approach for your entire company – for any job description put the name of the Department it will go into as part of the Job Title. Since every department may have one or two Administrative Assistants, this will make it easier when we are selecting a specific job description.

Return to Menu

<p>Job Title</p> <input type="text" value="Sales - Administrative Assistant"/>	<p>Department</p> <div style="border: 1px solid black; padding: 2px;"> - Select a Department - ▾ - Select a Department - Administration Billing Clinical/Respiratory Customer Service Drivers Finance Human Resources IT Sales Pharmacy Service </div>
<p>Date</p> <input type="text" value="11/10/2006"/>	<div style="border: 1px solid black; padding: 2px;"> us offices in an ation typically is phone calls, eeds to possess d mailing. </div>
<p>Overview</p> <div style="border: 1px solid black; padding: 2px;"> An administrative assistant has the primary responsibility for maintaining the daily operations of an HME company. This person maintains the daily operations and is responsible for general paperwork processing, general office management, greeting visitors to the offices, or providing assistance to customers. The position requires skills in computer word processing, data base management, and customer service. </div>	
<p>Position Qualifications</p> <div style="border: 1px solid black; padding: 2px;"> High School diploma or equivalent required Telephone experience Two years of HME/DME knowledge </div>	

Overview – This is completely editable. Like the majority of EmTrak, I'm simply trying to get you 80% of the way there with the pre-populated wording. Some companies want to get more specific, some less. Do you have an existing job description with an overview or key elements – who they report to, etc.? You could simply cut and paste that into this field.

Position Qualifications - These are completely editable, we are simply trying to give you a head start. Perhaps you have some in an existing job description you would like to cut and paste. Or perhaps you don't want any. You can edit, add or eliminate anything you want.

Essential Performance Requirements are also editable. Note that they are designed to meet the standards required by ADA for physical and mental demands. You will also note that these change depending on the job descriptions.

Essential Performance Requirements

Physical Demands – The physical demands described here are representative of those that must be met by the employee to successfully perform the essential functions of this job.

- Regularly requires sitting, standing and/or work at the computer, the phones and filing and office machines for extended periods of time.
- This person needs to have the ability to regularly lift and/or move up to 10 pounds and occasionally lift and/or move up to 25 pounds.
- Good fine motor dexterity and cognitive ability for effective typing, use of a calculator, writing and filing.
- Command of the senses to a level appropriate for the workplace, including vision, hearing and speech.

Editing Bullet Points

HERE'S THE COOL PART!

As we scroll down this page, you will notice that only those tasks we selected are a part of this job description. But, where did the bullets go? You will notice that the terms are exactly the same, just the bullet points are gone temporarily. That's because you can now completely edit each and every one of those bullets. Let's cover more on the next page.

This is why it is such an advantage to build your job description as a Word document. Then all you have to do once you get to these fields is cut and paste from your document into the open field. No need to edit on-line.

Essential Tasks (what they do):

Administrative Assistant -- Office Machines and Data Entry

Efficiently use the computer and software appropriate for this position.
 Efficiently operate all office machines appropriate for this position.
 Use equipment in an ergonomically correct manner.
 Fully understand and utilize the appropriate computer systems to input data and maintain computer files as needed.

Administrative Assistant -- Records Management

Assist in the smooth flow of paperwork and information within the office.
 Create and alphabetize file folders.
 File documents accurately.
 Collect and distribute appropriate records as needed.
 Pull inactive files for storage. When appropriate, dispose of documents by shredding or other appropriate means.
 As needed, organize and scan documents, make certain hard documents are stored correctly, and pull up scanned images.

Administrative Assistant -- Correspondence

Type and print correspondence as necessary.
 Handle incoming and outgoing mail and faxes efficiently, routing to the proper channels.
 Copy, collate, and assemble literature as required.

So, let's look at the Records Management piece. This is an Administrative Assistant for Marketing. Let's tweak that task so it is specific to this person.

Administrative Assistant -- Records Management

Assist in the smooth flow of paperwork and information within the office.
 Create and alphabetize file folders.
 File documents accurately.
 Collect and distribute appropriate records as needed.
 Pull inactive files for storage. When appropriate, dispose of documents by shredding or other appropriate means.
 As needed, organize and scan documents, make certain hard documents are stored correctly, and pull up scanned images.

Let's say we want the line "Create and alphabetize file folders to be more specific" and change it to "Create and alphabetize file folders for all referral sources and managed care contacts". Let's also get rid of the line that mentions scanning, since that is not part of records management for this person.

Administrative Assistant -- Records Management

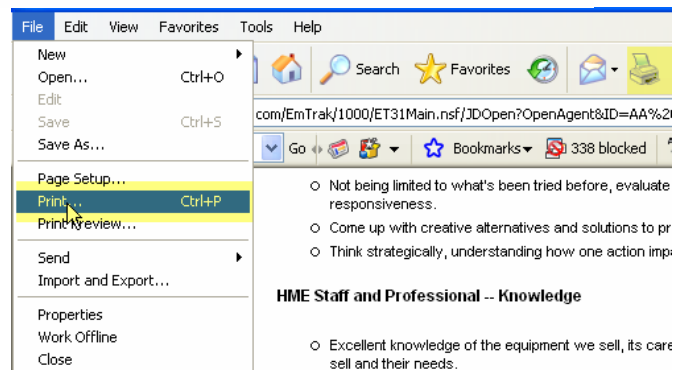
Assist in the smooth flow of paperwork and information within the office.
 Create and alphabetize file folders for all referral sources and managed care contacts.
 File documents accurately.
 Collect and distribute appropriate records as needed.
 Pull inactive files for storage. When appropriate, dispose of documents by shredding or other appropriate means.
 As needed, organize and scan documents, make certain hard documents are stored correctly, and pull up scanned images.

We make those changes. If there are other changes you need to make in other bullet points or any other element, get those made, click the NEXT button – we're there.

Administrative Assistant -- Records Management

- Assist in the smooth flow of paperwork and information within the office.
- Create and alphabetize file folders for all referral sources and managed care contacts.
- File documents accurately.
- Collect and distribute appropriate records as needed.
- Pull inactive files for storage. When appropriate, dispose of documents by shredding or other appropriate means.

Click the NEXT button again and we have the finished product. Now print it out by choosing print on the browser menu under File or by clicking on the Printer icon.



You will note at the bottom a place that you can have the employee sign this job description and save it in your files (recommended by accrediting bodies). In fact, a few pages from here, when we discuss the **EMPLOYEE LOG** in this guide and on this CD we note how you could scan that signed job description in and attach them to this particular employee.

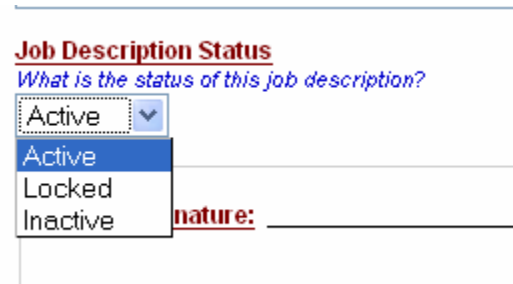


The screenshot shows a form titled "Job Description Status" with the question "What is the status of this job description?". The current status is "Active". Below this, there are three input fields: "Employee Signature:", "Reviewer Signature:", and "Review Date:". At the bottom right of the form is a "Return to Menu" button.

Again, I will note that this is where most of the work comes in, but now you've got job descriptions with laser-like accuracy for every employee.

Job Description Status

For a manager, at the bottom of the Job Description template are two options – Active, and Inactive. Managers and Super Managers both could choose for a job description to be ACTIVE or INACTIVE. You would want to designate a job description as inactive if you had a job description that was no longer applicable, but you might choose to use it again later. The default setting is ACTIVE.



The screenshot shows the "Job Description Status" dropdown menu. The options are "Active", "Locked", and "Inactive". The "Active" option is currently selected. Below the dropdown is a "nature:" label followed by a horizontal line.

The Super Manager has an additional option – LOCKED. If the Super Manager chooses LOCKED, that means the job description can not be changed. This may be valuable when a company chooses to make certain job descriptions can't be changed or modified, guaranteeing some consistency in the process.

Editing an Existing Job Description

Do you want to change this existing job description or did you perhaps forget to include something? Click on **VIEW JOB DESCRIPTIONS**.

Manager Menu

Create Job Description

View Job Descriptions

Create Employee

View Pending Documents

Open File Library

Open Interviewing Menu

Exit EmTrak & Close

Super Manager Menu

Welcome Jim Smith! What would you like to do today?

CREATE...	VIEW...
Job Description	Job Descriptions
Employee	Employees
Manager	Managers
OTHER...	Introductory Evaluations

A list of all the job descriptions will come up. Click on the title of the job description you want to edit.

Click on a job description to open for viewing and editing.

Del?	Job Description	Department	Date	Status
	AA HR	Administration	10/02/2006	Locked
	Big Job Description	Administration	10/18/2006	Active
	Billing - Collections and Denials	Billing	11/07/2006	Active
	Billing Team Leader	Billing	09/29/2006	Active
	CSR 1	Customer Service	09/28/2006	Active
	CSR 4 - office Supplies	Customer Service	10/10/2006	Active
	CSR Team Leader	Customer Service	10/09/2006	Active
	customer service rep	Customer Service	10/10/2006	Active
	Driver Tech 1	Drivers	10/26/2006	Active
	Reimbursement Specialist	Billing	11/14/2006	Active
	Respiratory Therapist - Vent	Clinical/Respiratory	10/05/2006	Active
	RTS	Clinical/Respiratory	10/09/2006	Active
	Sales - Administrative Assistant	Sales	11/10/2006	Active

Return to Menu

When that job description opens, click on **EDIT JOB DESCRIPTION**.

Edit Job Description

Return to Menu

Job Title Sales - Administrative Assistant	Department Sales
Date 11/10/2006	

This will bring up all the possible tasks that exist for that job (including the ones you didn't select before! That way, if you want, you can add those back in). The bullets you originally changed are still there. Click the **NEXT** button, make your changes, click **NEXT** again and your job description is updated!

Copying An Existing Job Description To Create A New One

Let's say you like the job description you created for the Admin Assistant in Sales so much that you want to use that same job description for an Admin Assistant in Billing. For example, you liked the way you modified the bullets under Records Management and want to use that same identical language for another Admin Asst, plus some other changes. Can you just open the job description and assign it to Billing?

You could, but then the job description would no longer exist for Sales. I'm afraid that a job description has to be tied to a department and it can't be tied to more than one department. It seems like it would be simple to allow you to assign a job description to more than one department, but the programming is actually very complex.

However, I have a fairly simple solution below for replicating that job description as a new one below.

Open EmTrak in two browser windows (for tips on opening two browser windows, go to [TIPS/FAQS/COMMON ERRORS](#) on this CD and look for the information on OPENING MULTIPLE BROWSER WINDOWS on this CD).

1. Open and the existing job description first for Sales – Administrative Assistant (we will call it Window #1) Use that existing job description as a guideline for the tasks you are going to choose (if they are identical).
2. Leave Window #1 open and open another browser (Window #2) to Emtrak and choose to create a new job description.
3. Choose the same job tasks in Window #2 as you had already chosen for the existing job description showing in Window #1.
3. In Window #1, the existing job description, keep hitting NEXT to the point that the fields are editable (like below). Do the same for the new job description in Window #2.

Essential Tasks (what they do):

Administrative Assistant -- Office Machines and Data Entry

Efficiently use the computer and software appropriate for this position.
Efficiently operate all office machines appropriate for this position.
Use equipment in an ergonomically correct manner.
Fully understand and utilize the appropriate computer systems to input data and maintain computer files as needed.

Once you are to this point, you can simply cut and paste from the original job description to the new one. Once you are done, then give the new job the name Billing – Administrative Assistant, assign to the billing department, you're golden.

Combining More than One Job Category

A lot of companies have employees doing multiple jobs – they may serve as a driver and a service technician. A manager may also be an RTS or an RT. You may have a person who does billing and also serves as a team leader or an RTS who also is in sales. EmTrak allows you to combine any job categories. Let's work as though we have an RTS who is also in Sales.

In this case you would check on two categories – Sales and RTS.

MED Supply Company

Select one or more job groups for this job description and click the Next button.

<p>HME Staff and Professional</p> <p><input type="checkbox"/> Administrative Assistant</p> <p><input type="checkbox"/> CSR</p> <p><input type="checkbox"/> Reimbursement Specialist</p> <p><input type="checkbox"/> Accounts Payable</p> <p><input type="checkbox"/> Warehouse Technician</p> <p><input type="checkbox"/> Driver Technician</p> <p><input type="checkbox"/> Service Technician</p> <p><input type="checkbox"/> Rehab Technician</p> <p><input type="checkbox"/> Pharmacy Technician</p> <p><input type="checkbox"/> Information Technology</p> <p><input type="checkbox"/> Pharmacist</p> <p>Sales/Clinical</p> <p><input checked="" type="checkbox"/> Sales</p> <p><input type="checkbox"/> Respiratory Therapist</p> <p><input checked="" type="checkbox"/> Rehab Technology Supplier</p> <p>Team Leader</p> <p><input type="checkbox"/> Team Leader</p>	<p>Management</p> <p><input type="checkbox"/> Pharmacist in Charge</p> <p><input type="checkbox"/> Service-Warehouse-Delivery Manager</p> <p><input type="checkbox"/> Reimbursement Manager</p> <p><input type="checkbox"/> Human Resources and Compliance</p> <p><input type="checkbox"/> Branch-Store Manager</p> <p><input type="checkbox"/> Director of Information Technology</p> <p><input type="checkbox"/> Director of Rehab Services</p> <p><input type="checkbox"/> Director of Respiratory Services</p> <p><input type="checkbox"/> Purchasing-Warehouse Manager</p> <p><input type="checkbox"/> Sales Manager</p> <p><input type="checkbox"/> General Management</p> <p>Senior Management</p> <p><input type="checkbox"/> Operations</p> <p><input type="checkbox"/> Finance</p> <p><input type="checkbox"/> Senior Management</p>
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<< Previous Next >>

Then when we go through the job description, we will be selecting from a number of tasks, some RTS related, some sales, all specific to what this person does for a living. The combinations are endless. Keep in mind the importance of selecting only those tasks that are directly relevant to this position (I only say that because you could end up with almost too many tasks for the position – when in doubt, keep it simple).

You will begin the same way that you began the other job descriptions, by printing out the Word worksheets for BOTH positions and working them out on paper before you put them online.

As you select tasks, you will notice that some overlap. For example, when you selected Sales and Rehab Technology Supplier, both had a task for Education and Inservices. They are the same, simply choose one over the other.

THAT'S THE ADVANTAGE OF PRINTING OUT THE WORD DOCUMENTS FIRST, YOU CAN QUICKLY SEE WHERE DUPLICATES MIGHT EXIST

Sales -- Education and Inservices

- Participate in educational and professional programs and/or review professional literature on an ongoing basis to maintain knowledge and competency in current and developing techniques, professional standards, and the products and services offered by our company.
- Plan, develop and implement marketing action plans in cooperation with management and other appropriate colleagues for public relations through referral sources (CEU's), trade shows, user groups and promotional events.
- Propose, develop and provide community presentations, workshops, and seminars for both patients and referral sources specific to the products your company provides.
- Attend and present to educational meetings and seminars for healthcare workers, patients/clients, families,

Rehab Technology Supplier -- Education and Inservices

- Participate in educational and professional programs and/or review professional literature on an ongoing basis to maintain knowledge and competency in current and developing techniques, professional standards, and the products and services offered by our company.
- Plan, develop and implement marketing action plans in cooperation with management and other appropriate colleagues for public relations through referral sources (CEU's), trade shows, user groups and promotional events.
- Propose, develop and provide community presentations, workshops, and seminars for both patients and referral sources specific to rehab issues.
- Attend and present to educational meetings and seminars for healthcare workers, patients/clients, families, caregivers, physicians, and interested community members on areas of need.
- Arrange in-services for referral sources, working with management and appropriate organizations such as MED

Question: So why does it have to be that way – it seems more complicated than it has to be!!

Good question, here's why. Each job has to be able to stand alone – therefore, it must offer every possible task. Someone who is in Sales, only, obviously may be doing Inservices & Education. Someone who is an RTS, but does no sales, may also be offering Inservices & Education. Again, this is actually very complex programming to make this all work. Because this software is browser-based – one of the things we can't quite achieve is your computer automatically eliminating a duplicate task if you choose another. It doesn't mean we won't continue trying to find a way to make it happen.

After you have selected the tasks and click NEXT, then you will be taken to the screen we saw earlier, where you will name the job, choose the department, etc. Note on the Overview, Position Qualifications and Essential Performance Requirement, there may be duplicates because we are combining jobs. Use the scroll bar on the right to scroll down and double-check (this is only necessary when combining two different job titles). Again, editing is simple – highlight and delete or edit as needed. Simply edit and change as needed.

Overview

This person has the primary responsibility of generating increased company revenues by promoting the products and services of the company to prospective customers, primarily by developing effective relationships with existing and potential referral sources. This is most often done outside of the company offices, but can in some cases may be a person who does extensive out-going telemarketing as their primary function or works a retail showroom.

A Rehab Technology Supplier (RTS) has as a primary responsibility assessing rehabilitation patients, evaluating patient needs and selecting the proper assistive technology, most often mobility. The RTS is responsible to the customer for assuring timely and accurate acquisition of equipment and delivery. This

Position Qualifications

High school diploma or equivalent
Minimum of one year in sales
Two years sales experience in HME/DME
Understanding of clinical aspects of sales

High school degree or equivalent
Two years experience in rehab
Clean driving record
BS/BA degree

Essential Performance Requirements

Physical Demands – The physical demands described here are representative of those that must be met by the employee to successfully perform the essential functions of this job.

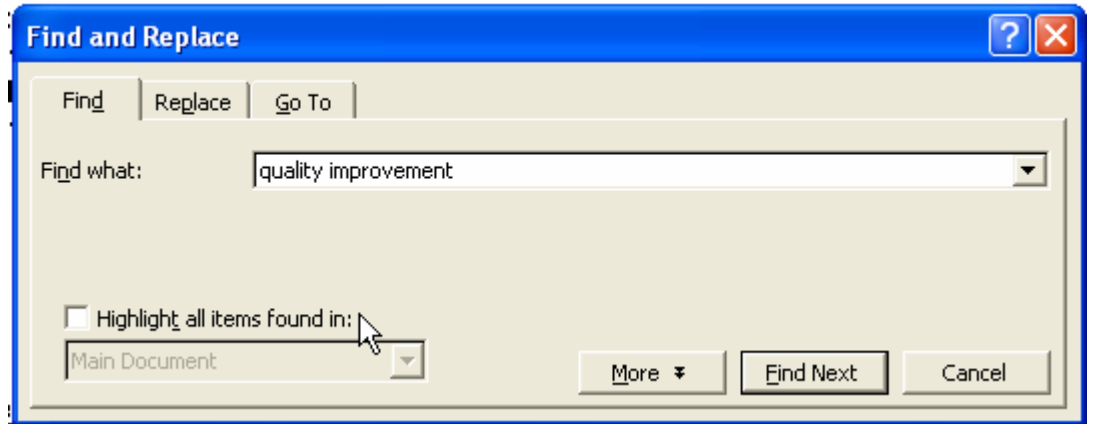
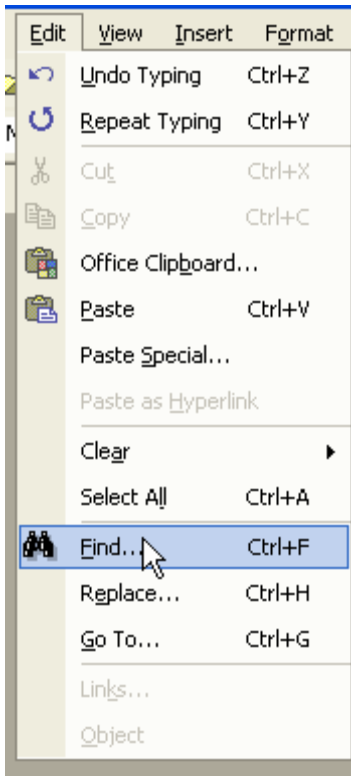
- Work of medium physical demand, frequently requiring lifting and carrying items weighing up to 75 pounds. Frequent stooping and bending when handling equipment and supplies. Regularly requires sitting, standing or driving vehicles for extended periods of time.
- Ability to withstand working in an open environment, where both heat and cold may be extreme.
- Good fine motor dexterity and cognitive ability for driving and command of the senses to a level appropriate for driving and instruction to customers, including vision, hearing and speech.

The rest of the process is just like creating any job description, give the job a name, assign a department, click NEXT and you're done.

What If I Can't Find The Task I Need?

If you don't find the job task you are looking for, there is a document entitled EMTRAK JOB DESCRIPTIONS TOTAL that you will find on this CD. In that Word document, you could use the search feature to find a task. For example, if you had a branch manager who also does quality improvement, you could put the word "quality" or the words "quality improvement" in the form. This would search the entire list of job descriptions and you would find that in the job description for Director of Human Resources and Compliance job description. Therefore, when you build the job description for this specific Branch Manager, you also would open up the Director of HR and Compliance job description to be able to add that element in .

Again, it takes some work and creativity. Contact me, Gary Schwantz, if you have any challenges finding an appropriate task for a job.



It's also possible that the task has not been created yet. EmTrak 3.1 is meant to be a live program, meaning it will continue to grow and change to meet your needs. Any time you can't find the task you need or find a job description doesn't exist, contact me, Gary Schwantz, at gschwantz@medgroup.com or call me at 800.825.5633. I love the opportunity to work with you and make EmTrak 3.1 meet your needs.

VIEW (and edit) JOB DESCRIPTIONS

Manager Menu

Create Job Description

View Job Descriptions

Create Employee

View Pending Documents

Open File Library

Open Interviewing Menu

Exit EmTrak & Close

Super Manager Menu

Welcome Jim Smith! What would you like to do today?

CREATE...	VIEW...
Job Description	Job Descriptions
Employee	Employees
Manager	Managers
OTHER...	Introductory Evaluations

From either menu you can view what job descriptions exist. Click on VIEW JOB DESCRIPTIONS. A list will come up of every job description that exists for the company. Note that it shows what department that job description is assigned to, the date it was created, whether it is active, locked or inactive or not (if it is locked, keep it mind the job cannot be edited).

Click on a job description to see that job description. At this point you could simply print it out, edit it as we discussed, or copy it to create a similar job description for another department. Notice the Del? Column. That lets you delete that job description from the system, just click on the trash can.
Note: your better option may be to simply make that description inactive – if you think there is a reason you might want to use it again.

Click on a job description to open for viewing and editing.

Del?	Job Description	Department	Date	Status
	AA HR	Administration	10/02/2006	Locked
	Big Job Description	Administration	10/18/2006	Active
	Billing - Collections and Denials	Billing	11/07/2006	Active
	Billing Team Leader	Billing	09/29/2006	Active
	CSR 1	Customer Service	09/28/2006	Active
	CSR 4 - office Supplies	Customer Service	10/10/2006	Active
	CSR Team Leaar	Customer Service	10/09/2006	Active
	customer service rep	Customer Service	10/10/2006	Active
	Driver Tech 1	Drivers	10/26/2006	Active
	Reimbursement Specialist	Billing	11/14/2006	Active
	Respiratory Therapist - Vent	Clinical/Respiratory	10/05/2006	Active
	RTS	Clinical/Respiratory	10/09/2006	Active
	Sales - Administrative Assistant	Sales	11/10/2006	Active

Return to Menu