

# Inside the Health Services Office: Roles, Responsibilities, and Skills

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## CHAPTER OUTLINE

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### Introduction

### Roles Within the Health Services Office

Health Services Office Manager

Health Services Office Administrator/  
Health Services Office Assistant

Health Services Office Receptionist

Billing Clerk

Education and Training

Skills and Abilities of the Health  
Services Office Administrator

Dealing Effectively with Stress

Notes

Resources

Critical Reflection Questions

Active Learning

## LEARNING OUTCOMES

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*After completing this chapter, you should be able to*

- describe the roles, duties, and responsibilities of health services office administrators (HSAs)
- briefly describe the roles of other administrative health care staff in a health services office
- identify practical skills, soft skills, and interpersonal skills for HSAs
- identify and apply time management skills
- define stress and identify strategies to reduce stress
- explain how HSAs can keep current regarding medical knowledge, policies, and procedures, and the latest trends in the health services community

*You can teach a student a lesson for a day; but if you can teach him to learn by creating curiosity, he will continue the learning process as long as he lives.*

— Clay P. Bedford

## INTRODUCTION

A competent and professional health services office administrator (HSA) is essential for the efficient management of a health services office and is among a physician's greatest assets. A typical day might include advancing an appointment to allow an anxious parent to bring in a sick child, calming a patient who is angry about a bill, building a rapport with a patient who is afraid of being in a health services environment, or offering a listening ear to a patient—especially one who is elderly or lives alone and may be longing for contact. Every day is different and exciting and offers challenges. A career as a health services office administrator is a demanding one that requires dedication, commitment, and a strong desire to become a caregiver.

Health services office administration requires skills and expertise in patient greeting and registration; health card validation; telephone communication; scheduling; records management; billing, payroll, and financial management; **referrals**; insurance forms; and a range of correspondence. Other tasks may include preparing the patient and the examination room and possibly assisting the physician during the patient's office visit; sterilizing equipment and the waiting room (especially the children's area and toys); controlling inventory and ordering supplies; collecting and preparing laboratory specimens; and organizing meetings, conferences, and business trips.

This book introduces you to the role of the health services office administrator (also called a health services office assistant) within the broader health care system. In this chapter, we will look at the roles of various individuals who work together in a health services office to ensure its smooth functioning. We will then look at the role of the health services office administrator in more detail, including the initial and ongoing training and education required, areas of responsibility, and the specific skills you will need in order to succeed in this career.

## ROLES WITHIN THE HEALTH SERVICES OFFICE

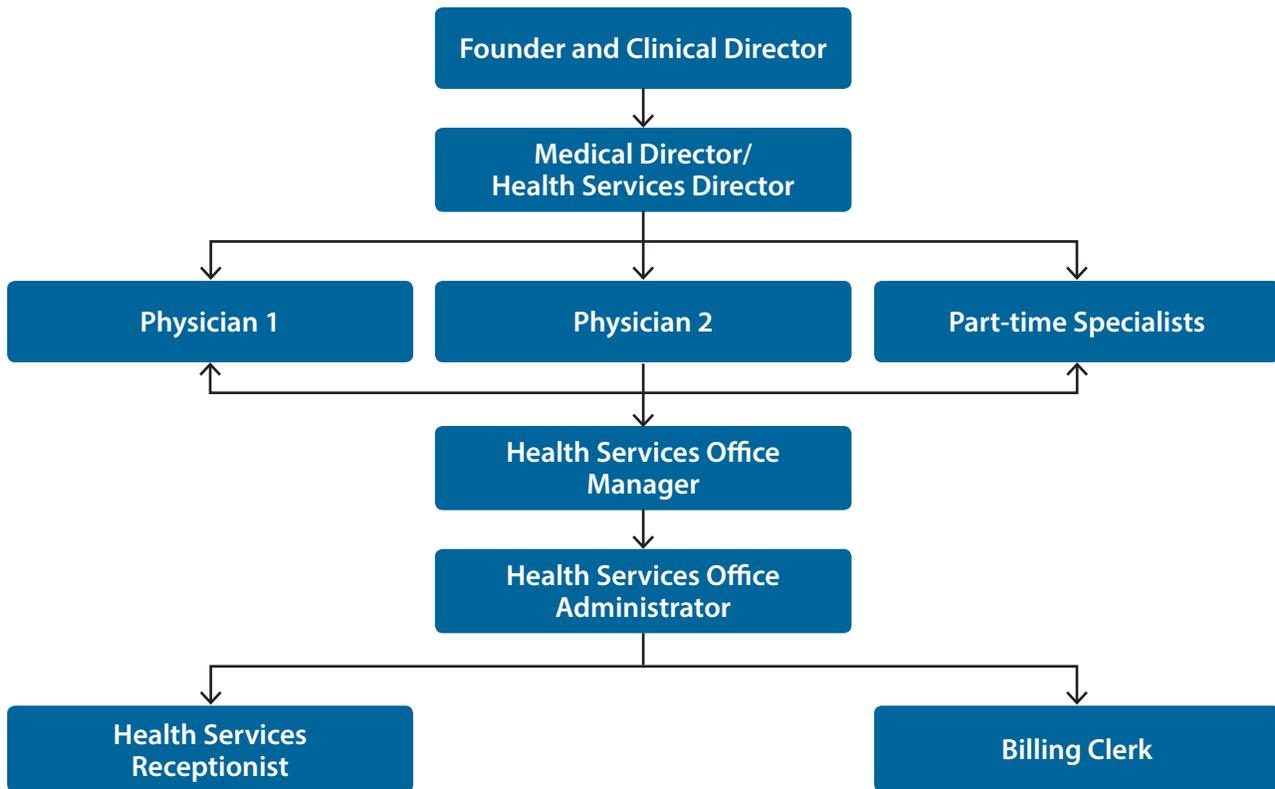
In addition to the physician(s), a typical health services office includes a health services office manager, a health services office administrator/assistant, a receptionist, and a billing clerk. Depending on the office, some of these roles may be shared; for example, the office administrator may also perform the duties of a receptionist.

Table 1.1 sets out sample job descriptions for some of the above roles. Figure 1.1 shows a sample hierarchy of a typical health services office.

**Table 1.1 Health Services Office Job Descriptions**

Health Services Office Manager	Health Services Office Administrator	Health Services Office Receptionist
Oversees financial matters, including payroll, bookkeeping, assisting the doctor(s) in developing and maintaining a budget, and banking	Acts as the liaison between the patient and the practitioner; provides all patient communication	Comforts patients by anticipating their anxieties, answering questions, and maintaining the reception area

Health Services Office Manager	Health Services Office Administrator	Health Services Office Receptionist
Acts as the main point of contact for staff in matters of pay, benefits, and hours worked, and makes decisions in accordance with policies established by the doctors	Maintains electronic medical records (EMRs)—updates addresses, allergies, phone numbers, etc., on each visit; ensures patients’ records are up to date and correct regarding medications, treatments, symptoms, side effects, etc.	Keeps patient appointments on schedule
Develops and implements organizational policies and procedures for the facility or health services unit	Ensures that correct billing information is collected to produce and generate clean claims for submission; processes billing	Answers questions or provides general information, or may direct a patient to a person who can provide the information
Recommends, plans, and implements pay structure revisions	Schedules patient appointments	Schedules equipment service and repairs
Develops, recommends approval of, and maintains staff hours and vacation schedules	Schedules patients for tests and follow-up appointments promptly and efficiently	Ensures availability of treatment information by filing and retrieving patient records
Provides advice to the doctor(s) on finance, human resources, and other administrative matters	Prepares examination rooms; selects, sets up, and maintains medical supplies and equipment for all examinations and procedures	Greets patients when they enter the clinic
Ensures that staff are kept informed of current legislation, standards of practice, and scope of practice	Maintains business office inventory and supply inventory for exam rooms	Optimizes patients’ satisfaction, provider time, and treatment room utilization by scheduling appointments in person or by telephone
Directs, supervises, and evaluates work activities of staff	Maintains patient privacy and confidentiality at all times	Answers telephones; responds to and sends faxes
Establishes work schedules and assignments for staff	Provides administrative support to practitioner, including reception, data entry, records maintenance, and correspondence	Protects patients’ rights by maintaining confidentiality of personal and financial information
Maintains awareness of advances in medicine, computerized diagnostic and treatment equipment, data processing technology, government regulations, health insurance changes, and financing options	Coordinates flow of patient care; ensures that patient moves from waiting room to exam room and other clinic services without unnecessary delay	Processes incoming and outgoing mail (including email and faxes)

**Figure 1.1** Sample Hierarchy in a Typical Health Services Office

### Health Services Office Manager

The health services office manager is responsible for ensuring that the office runs smoothly and efficiently on a day-to-day basis. To this end, he or she oversees and implements organizational and clerical tasks and procedures, providing for uniformity in patient care and office procedures, such as appointment booking, maintaining a calendar, meeting support, administering and monitoring billing and accounts receivable and payable. The manager is also responsible for ordering, maintaining, and tracking office and medical supplies.

Managers have the responsibility of keeping health care as consistent as possible to ensure the best outcome for all patients. Because each patient and each complaint or concern may be slightly different, some flexibility must be given to the managers to adapt office protocol and procedures to patient needs. For example, if a patient regularly comes in for a blood pressure (BP) check on Wednesday mornings (current scheduling protocol for such quick checks) but is feeling dizzy on Friday and would like to come in then, office scheduling protocol needs to be flexible enough to accommodate this patient.

A health services office manager holds, at minimum, a health services office administration diploma combined with several years' experience as a health services office administrator/assistant and, often, further education. If you thrive on solving problems, supervising many different people, and organizing and streamlining processes, you might consider a career in health services office management after gaining experience as a health services office administrator.

In a well-run health services office, communication and direction will be a two-way exchange and may not always flow from the top down. Most family practices will have the physician at the top tier and may also include part-time specialists and a registered nurse, nurse practitioner, or both.

### Health Services Office Administrator/Health Services Office Assistant

The health services office administrator (HSA), also called a health services office assistant, administrative health services assistant, or health services secretary, is the main link between the health services office and the public. Health services office administrators' responsibilities are largely clerical in nature, and training includes developing expertise in the following areas:

- records management
- procedure and diagnosis coding
- telephone procedures
- scheduling
- mail processing
- the completion and submission of medical billing and insurance forms
- all types of correspondence, including transcribing dictations
- chart management

Health services administrators may work in a variety of health care settings, including physicians' offices, walk-in clinics, health teams, **public health units**, and hospitals; nursing homes; medical supply companies; chiropractic, podiatry, and physiotherapy clinics; medical insurance offices; veterinary hospitals; and universities. In some offices, performance of some routine clinical tasks may also be required.

A health services office administrator or assistant holds a Health Services Office Administration diploma and, usually, minimal experience (one to two years). We will examine the role of the HSA in more detail in the rest of this chapter.

#### DID YOU KNOW?

In a hospital setting, a health services office administrator may take on the role of unit clerk (also known as a ward clerk) (see Chapter 10). Unit clerks play a vital role on hospital nursing units by performing such functions as transcribing physicians' orders, serving as a first point of contact for patients' families, scheduling patients for tests and treatments, and maintaining medical records for inpatients.

**BOX 1.1 THE HEALTH SERVICES OFFICE ADMINISTRATOR**

A health services office administrator (HSA) or receptionist is the front line of the health services office. Individuals in these roles are an important link in Canadian health care, serving as the first point of contact for patients and visitors to the office, clinic, floor, or other workplace setting, and contributing to its overall operation.

An important part of your job as an HSA involves carrying out your duties in accordance with the range of legal and ethical responsibilities that physicians have under federal and provincial/territorial legislation and the regulations developed by various governing bodies, such as the College of Physicians and Surgeons of Alberta. If, in dealing with medical records, you fail to protect the confidentiality of patients' **personal health information**, for example, the physician will be in breach of his or her legal obligations under the **Personal Health Information Protection Act (PHIPA)**, and serious consequences may follow.

One important limit on your responsibilities flows from the fact that in Canada, only licensed physicians are permitted by law to give medical advice to patients. This means that if administrative staff offer medical or medication advice, both the physician and the HSA may find themselves involved in a medical malpractice lawsuit. The HSA may, however, ensure that the patient understands directions given by the physician in regard to medications, treatment, or tests. We will examine legal responsibilities in more detail in other chapters of this text.

Typical work hours for HSAs are 37.5 to 40 hours per week, with some working part time. Unlike many general office administrators, it is rare for HSAs to work from home because their presence is essential to the smooth running of the health services setting.

Table 1.2 summarizes the primary administrative and clinical responsibilities of HSAs.

**Table 1.2 Primary Administrative and Clinical Responsibilities of HSAs**

Administrative Responsibilities	Clinical Responsibilities
<ul style="list-style-type: none"> <li>• Answering telephones</li> <li>• Scheduling appointments</li> <li>• Interviewing and instructing new patients</li> <li>• Coding and transmitting insurance claims</li> <li>• Explaining fees</li> <li>• Opening and sorting mail</li> <li>• Answering routine correspondence</li> <li>• Transcribing electronic dictation</li> <li>• Coding and transmitting insurance</li> <li>• Maintaining financial records and files</li> <li>• Supervising personnel</li> <li>• Helping with the preparation of speeches</li> <li>• Clipping articles from professional journals</li> <li>• Conducting journal article research</li> </ul>	<ul style="list-style-type: none"> <li>• Helping the patient prepare for examinations and other procedures*</li> <li>• Recording medical history</li> <li>• Assisting in examinations when requested to do so*</li> <li>• Cleaning and sterilizing instruments and equipment*</li> <li>• Instructing patients regarding preparation for radiologic and laboratory examinations*</li> <li>• Keeping supply cabinets and examining rooms well stocked*</li> <li>• Performing a variety of laboratory tests, such as urinalysis* and blood studies</li> </ul>

\* Clinical skills usually required of the office assistant/administrator.

## Health Services Office Receptionist

A receptionist's major role in the health services office is greeting patients and other visitors. The patients' first contact with the office may be by phone or in person, and it will be the receptionist's job to obtain the information needed to begin a new chart or book an appointment. Once the patient or visitor has arrived at the office, the receptionist is responsible for putting the visitor at ease, obtaining his or her health services insurance information (e.g., OHIP in Ontario, and MSP in British Columbia), and directing him or her to the waiting area. Receptionists may also play a role in records management, referrals, and outgoing calls.

A receptionist may have a two-year health services office administration diploma or a one-year general office administration certificate. Some health services offices will accept a high-school diploma, but remuneration will reflect education level.

Although the role of receptionist is typically a separate role in a health services office, some offices—particularly smaller practices—may not have a receptionist on staff, and receptionist duties may fall to the HSA.

## Billing Clerk

The billing clerk focuses on diagnostic and procedure coding and billing. Billing clerks complete insurance claim forms and determine insurance coverage and limitations for patients.

A billing clerk holds a health services office administration diploma. Generally, billing responsibilities fall to the HSA in addition to his or her other tasks. However, in large offices, an HSA may work solely as a billing clerk.

### DID YOU KNOW?

The first HSAs were most likely the physician's spouse or neighbour, who fell into the position of helping the physician meet the needs of both the patients and the office. Today's HSAs are skilled and versatile professionals who play an integral role in a health services office, working closely with the physicians, nursing staff, other health services staff, and patients.

## Education and Training

Educational requirements vary by employer. However, most employers prefer at least a two-year college office administration diploma with a health services concentration. Specific types of health services office administration may require supplementary training or education. For example, a unit/ward clerk will also be given in-hospital training before managing a hospital floor's nursing station or nursing centre, while an HSA working in a specialist's office may require upgrading in medical terminology specific to that specialty.

The Ontario Ministry of Colleges and Universities publishes program standards for every Health Services Office Administration program.<sup>1</sup> These standards bring a greater degree of consistency to health services office administration programs Ontario-wide. Other provinces have their own ministry guidelines for colleges, universities, and training centres.

According to Statistics Canada, “There are over 200 trades in Canada, each with specific standards and training requirements outlined by each jurisdiction.”<sup>2</sup> Every Canadian province has a quality assurance program for higher education. Each provincial quality assurance program provides program guidelines to ensure consistency and quality of college, university, and training programs. Each program undergoes periodic reviews/audits to help maintain the quality of these postsecondary programs.

Universities Canada provides a link to each province and their program standards. Visit the website at [www.univcan.ca](http://www.univcan.ca) and search for provincial quality assurance systems.

Ongoing professional development will help you acquire the additional skills you may need depending on your career path and will ensure that your professional knowledge remains up to date. Additional training may be obtained from various sources. The Ontario Hospital Association provides professional development for health services office administrators, as does the Association of Administrative Assistants. The Institute for Healthcare Improvement is American but an excellent online resource.

### Skills and Abilities of the Health Services Office Administrator

Being responsible for the day-to-day administration of any health services setting requires knowledge, commitment, and patience; a high level of professionalism; and practical skills as well as soft skills. As an HSA, you will interact with people and will need specific skills to perform the full range of activities that will be required of you. Mastering them will prepare you to offer excellent customer service and maintain a pleasant office environment for both your co-workers and your clients.

#### Practical Skills

**Practical skills** include general, administrative, and clinical skills.

Health services administrators must have up-to-date computer skills and must be able to use word-processing software (such as Microsoft Word), spreadsheets (such as Microsoft Excel), and databases (such as Microsoft Access). They must be able to troubleshoot basic computer malfunctions and be able to obtain valid information from reliable online sources.

Knowledge of medical terminology and basic pharmacology is necessary for the HSA to be able to communicate with physicians, patients, and pharmacy staff. As mentioned, knowledge of medico-legal matters (those relating to law as well as medicine) is also vital to avoiding medical liability suits.

Table 1.3 lists the practical skills that HSAs must possess to run an office efficiently.

#### Soft Skills

In addition to the practical skills listed above, a successful HSA will require a range of **soft skills**. These are skills that employers and patients value, and that allow HSAs to work effectively when working alone and positively when working with others. Following is a list of soft skills that will serve you well in your career.

- *Motivation, Initiative, and Responsibility*

An HSA who takes initiative demonstrates to the physician that he or she is motivated and satisfied with the job. Office staff should be willing to help others, if able, and willing to learn additional skills. For example, perhaps the receptionist has a line-up of patients, some needing

to check in and others needing to rebook an appointment. As an HSA, you might volunteer to take over the patients checking in so that the receptionist can focus on rebooking appointments. Or, perhaps you notice that the physician has left a pile of charts on the desk that are no longer needed. Without having to be asked, you might take initiative by quietly removing and filing them.

A responsible office employee arrives on time and is available for all scheduled worked hours.

- *Attitude, Empathy, and Listening*

A positive attitude plays an important role in wellness—not only yours, but patients' too. You should be able to accept constructive criticism that is provided to help you excel professionally.

Being able to put yourself in your patients' situations and see their point of view will help you understand how they feel and may offer insight into why they may be angry or upset. This understanding allows you to look at situations objectively and not be personally offended.

Patients expect receptionists and assistants to have the answers and be able to help solve their problems. Thus, they may view staff who cannot provide answers as antagonistic or indifferent. Listen and observe. Learn to evaluate patients' behaviour. Listen to what they are saying, both verbally and with their body language. Use these clues to decide on the best response.

**Table 1.3 Practical Skills of HSAs**

General Skills	Administrative Skills	Clinical Skills
Medical terminology, usage, and spelling	Telephone skills and scheduling	Application of aseptic technique and infection control*
Basics of medical law and ethics	Proficiency in typing and keyboarding	Testing for vital signs
Human relations and personal communications	Communication, both written and spoken	Interviewing and recording of patient history
Computer literacy	Electronic dictation and word processing	Patient instruction*
Documentation of health information	Health information and management	Specimen collection and handling*
Cardiopulmonary resuscitation	Patient and insurance billing	Performance of selected tests
Legible handwriting		
Emergency first aid kit		

\* Clinical skills usually required of the office assistant/administrator.

### Workplace Scenario 1.1

#### Consider This

Your morning has been very busy with lots of interruptions, and you are feeling frazzled. A patient approaches the desk and angrily states, “I have been waiting a long time to be seen. How much longer? Patients who arrived after me have come and gone!” You realize that in all the confusion, you did not place this patient’s chart into the proper pile, and the physician believes that she was a “no show.”

1. What do you do?
2. How will you defuse the patient’s anger?
3. What will you say to the physician?

### Workplace Scenario 1.2

#### Consider This

Your physician went overtime with the first patient of the day and has been unable to make up the time during the morning appointments. Now it is time for the office to close for lunch, and there are two patients yet to be seen in the waiting room. Both patients have been waiting over 30 minutes for their scheduled appointments. One of the patients approaches you. He is angry at the long wait and demands an explanation, plus an idea of how much longer the wait will be. The patient is frustrated, and his tone and body language are aggressive. Put yourself in the patient’s place.

1. How would you respond?
2. Would you be able to defuse some of the patient’s anger?
3. Is there anything you might do to make the patient’s wait more comfortable?

- *Cultural Awareness and Sensitivity*

An awareness of and sensitivity to cultural diversity is an extremely important soft skill to develop. Patients’ value systems, beliefs, and practices—like your own—are influenced by, among other things, their nationality, ethnic origin, gender, age, religion, sexual orientation, disability, and socio-economic status. Language barriers may create obvious difficulties with communication, while other differences may affect your interactions in more subtle ways. It is important to be aware of how this may affect communication and to treat all patients with equal respect.

- *Communication*

Communicating effectively with patients is important to providing quality care. Effective verbal communication requires the HSA to consider using a strong, confident voice. Hint: If you are communicating on the phone, remember to smile! Smiling automatically changes the tone of your voice as you speak with the person on the other end. Strong verbal communication skills require **listening**. Active listening means not only listening to what the person is saying but actually hearing what the person is saying. It means being engaged, making eye contact and making an effort to understand what they are trying to say. Be sure you understand what is being said. Ask questions, avoid interrupting and show interest to ensure you understand the speaker’s point or message.

When communicating in person, in a meeting or over the phone, do your best to avoid placing words (such as ‘uh,’ ‘um’) where you pause. Verbal communication skills are important but do not dismiss the importance of **nonverbal communication**.

Nonverbal communication requires the HSA to be aware of the patient’s body language and facial expressions, as these will provide clues to how relaxed or stressed the patient may be. Listen to patients’ concerns, and speak clearly.

**Written communication** (email, text message, social media, memorandum, or letter) is another way an HSA will communicate with patients and staff. It is important to make sure your message is professional (use proper grammar and punctuation), clear, and concise. Written communication may be interpreted incorrectly; be aware that tone can be misinterpreted and may create unintentional problems. To avoid any confusion, choose wording carefully and limit your use of acronyms, abbreviations, or industry jargon.

### Workplace Scenario 1.3

#### Consider This

Betty Gutels visits her brother, Peter Gutels, in a long-term nursing care home. When she enters his room, she discovers that he fell sometime in the last 24 hours. Visibly upset, she approaches the nursing station demanding to know when and how her brother fell and why she wasn’t called. The ward clerk on duty, Cara Best, has just started her shift and has not had time to familiarize herself with the background regarding the fall. Cara becomes defensive—which shows in both her body language and tone of voice. Betty is frustrated; she feels that Cara is rude, unhelpful, and dismissive of the incident.

1. How might Cara have diffused the situation?
2. Was her reaction to Betty’s demand for information justified?

#### QUICK TIP

The most important communication skill is listening. So, listen, really listen to co-workers, patients, physicians, and other individuals in the health services office setting.

- *Appearance*

The essentials of a professional appearance are good health, good grooming, good posture, and appropriate dress. A well-groomed HSA in appropriate workplace attire has a positive psychological effect on patients and contributes to the perception of professional competence.

- *Confidentiality*

The ability to keep information confidential not only instills trust but also is essential for ensuring that you meet the legal requirements placed on those who handle patients’ personal information.

- *Critical Thinking Skills*

The best employees apply **critical thinking skills**. Critical thinkers are aware of alternatives to solving problems and can think “outside the box.” They are resourceful and are able to break down problems or questions into smaller parts, and then examine these parts to find solutions or reach alternative conclusions about a problem or an issue. Critical thinkers use good judgment to solve problems based on knowledge and experience.

**PRACTICE TIP**

Increasing your awareness and understanding of diversity will result in improved communication and interactions with patients.

**Workplace Scenario 1.4**

**Consider This**

Suppose you feel that your health services office should have an additional phone line, as there are periods during the day when the lines are busy and you are unable to call out. This hampers your ability to call patients regarding follow-up and to keep up with referral requests. You have spoken to the physician, and she is not willing to pay for a new line.

1. How would you solve your dilemma?

- *Teamwork*

The ability to work in a team is essential to the smooth operation of a health services office. Tasks are coordinated to flow from one to the other, and the office staff must work together to ensure patients' charts are up to date, patients' needs are met, and wait times are minimized. It is important to remember that team dynamics often change. Changes may occur when a new employee is hired or a physician retires, for example. The ability to adapt to these changes requires flexibility and a willingness to adapt.

- *Time Management*

Developing excellent time management skills will allow you to complete multiple tasks in an efficient manner. HSAs should be able to prioritize and perform multiple tasks, allowing the physician to focus on spending more time with patients.

HSAs who are good at time management are often excellent at prioritizing. An HSA must understand the difference between important and stat (something that needs must be completed NOW). One tool that might help determine task priority is a priority matrix (Figure 1.2). Another common method of tracking tasks is using a task or to-do list that prioritizes daily activities (Figure 1.3).

**Figure 1.2** The Priority Matrix (The Eisenhower Matrix)

The Priority Matrix (Eisenhower Matrix)		
High Importance	Action: Do First Examples: Answering the phone Scheduling patients	Action: Do Next Examples: Referrals Refills
	Action: Do Later Filing	Action: Don't Do
Low Importance	High Urgency	Low Urgency

**Figure 1.3** Sample Task/To Do List

Job#	Priority	Description
1	A1	Answering the phone
2	A2	Scheduling patients
3	C	Filing
4	B1	Refills
5	B2	Referrals

A = Now/Urgent

B = Do next/sometime today

C = Do later

Each category can be further prioritized

### BOX 1.2 TIME MANAGEMENT STRATEGIES

Here are some specific strategies that will help you increase your efficiency and improve your time management skills.

- *Set goals and deadlines for work to be completed.* Stay motivated by measuring your progress and offering yourself an incentive for each goal or deadline reached. Manage large and complicated projects by breaking them down into smaller parts and then setting deadlines for completing each part.  
*Streamline all repetitive tasks.* Never do the same thing twice. Use templates, macros, and other shortcuts provided by computer software.
- *Handle time wasters.* Stay focused on the task at hand. Let co-workers know that you need uninterrupted time to complete your work. If you have an office, shut your door. Do not encourage chit-chat. It may take several tries to persuade co-workers that you have work to complete and do not want to be interrupted. Remove any items or obstacles that will make it difficult for you to focus. Avoid procrastination.
- *Make **downtime** productive.* Set time aside each day to complete routine tasks, such as filing. Organize files and emails; help out a co-worker who is swamped with work; read or upgrade your skills; engage in professional development through further training.
- *Neatness and Organization.* Neatness not only conveys an impression of professionalism but will help you stay organized and allow you to carry out tasks, such as accessing documents and meeting deadlines, more easily. Use organizational aids and supplies, such as planners, incoming and outgoing trays, and file folders. Manage your workload by controlling paper and email. Use the flags and folders provided by your email program. Mark or file incoming mail as Items for Immediate Attention, Items to Deal with Later, Items to Be Forwarded, and Items to Be Filed.

**PRACTICE TIP**

As an HSA, you will always be multitasking. Using a steno pad is an effective way to organize your to-do list and stay on task. The steno pad is a legal document in the health services office, one that may be used as a legal resource in the event of litigation and which may be stored for several years. Each HSA in the office should have his or her own steno pad with name, start date, and finish date clearly written on the cover.

**BOX 1.3 SIGNS OF DIFFICULTY IN COPING WITH STRESS**

A range of symptoms can indicate that a person is having difficulty coping with stress:

- *Physical symptoms* can include headaches, teeth grinding or a clenched jaw, chest pain, shortness of breath, a pounding heart, high blood pressure, muscle aches, indigestion, constipation or diarrhea, increased perspiration, fatigue, insomnia, and a higher frequency of illness.
- *Psycho-social symptoms* may include anxiety, irritability, sadness, anger, mood swings, hypersensitivity, depression, slowed thinking or racing thoughts, feelings of helplessness or hopelessness, and decreased motivation.
- *Cognitive symptoms* may include decreased attention, difficulty concentrating, forgetfulness, and reduced problem-solving abilities.
- *Behavioural symptoms* may include overeating or loss of appetite, impatience, procrastination, increased use of alcohol or drugs, increased smoking, withdrawal or isolation from others, neglect of responsibility, poor personal hygiene, and change in close family relationships.\*

You can limit some of the factors that lead to above-normal levels of stress by doing the following:

- *Take your breaks.* Do not skip lunch or other breaks during the day.
- *Move.* Get up from the computer and move around. Stretch. It is recommended that you take a movement break of 30 seconds for every hour spent working at your desk.
- While working, use these techniques at your desk:
  - *Slow your breathing:* Take deep breaths, holding your breath on inhalation and then releasing slowly. Repeat several times.
  - *Practise muscle relaxation:* Pick a muscle and slowly tense it, then release. Repeat tensing and relaxing two or three times for each location you are able to tense.
- *Report health and safety hazards,* as well as harassment or bullying. Take control.
- *Try to position your workspace* (e.g., computer, telephone) in a way that minimizes noise and distractions.
- *Ask for help.* If you are drowning in paperwork or are behind in filing, ask for help from a co-worker or the health services office manager.
- *Laugh.* Laughter is truly one of the best medicines.
- *Reward yourself* for meeting a deadline or completing a difficult task.

Outside the office, some stress relievers include the following:

- *Sleep.* Getting eight hours of sleep will help you start a new day.
- *Exercise!* During exercise, bodies release endorphins, which create a natural high. Exercise helps regulate sleep, reduce tension, decrease depression, and boost your immune system.

Source: \* Based on "Workplace Stress," the Canadian Centre for Occupational Health and Safety <https://www.ccohs.ca/oshanswers/psychosocial/stress.html>.

## DEALING EFFECTIVELY WITH STRESS

Stress has been defined as a subjective phenomenon that creates worry or anxiety; a non-specific response of the body to change; and emotional, physical, or mental pressure. Stress is not always negative—in some cases, it may be helpful when it motivates people to accomplish more. Chronic workplace stress, however, is a serious health threat that can have devastating effects.

Stress can be categorized as low, normal, and high. When stress is too low, staff are not motivated and tend to be less productive. When stress is too high, staff are unable to cope and often become ill.

Without a certain amount of stress in the workplace, many tasks would not be accomplished. The trick is to find a balance so that stress remains at a manageable level. Stresses that are not considered normal and that often increase overall stress levels are noise, staff shortages, lack of control, conflicting work demands, harassment, and bullying. These stresses often lead to illness and poor work performance.

### Notes

1. Search “health services office administration” at the ministry’s website, <http://www.tcu.gov.on.ca/pepg/audiences/colleges/progstan/business/52308.pdf>.
2. Statistics Canada, “Structure of Education and Training in Canada,” <https://www150.statcan.gc.ca/n1/pub/81-582-g/2017001/app-ann/app-ann1-eng.htm>, sec. 3, para. 3.

### Resources

Ontario Hospital Association: [www.oha.com](http://www.oha.com).

Association of Administrative Assistants: [www.aaa.ca/index\\_e.php](http://www.aaa.ca/index_e.php).

The Institute for Healthcare Improvement: [www.ihl.org](http://www.ihl.org).

### Critical Reflection Questions

1. How could a manual or an electronic planner or calendar help you stay organized?
2. Is all stress bad? How can stress be helpful?
3. Define stress. Name one thing that has caused stress in your life.
4. Name four forms of communication. Identify and explain your strongest communication method.
5. Time management is important for the efficient operation of a health services office. Describe two time management practices that you feel are the most important. Explain.
6. You have 15 minutes of free time. How will you spend that time wisely?
7. Your day has become extremely busy. You have not taken any breaks and are starting to feel tired and negative. What can you do in this situation?
8. Critical thinking skills are essential in a busy health services office. Give an example of a situation in which you had to employ critical thinking.
9. You are working in a health services office as a receptionist and a patient has arrived to check in. She is clearly stressed and emotional and is becoming verbally abusive. How do you handle the situation?

## Active Learning

Using your classroom's online discussion board, provide a 200- to 300-word response, in paragraph form, to the following questions.

1. Browse the Association of Administrative Assistants' website and respond to the following:
  - a. How do you become a member?
  - b. Briefly describe three benefits that would influence you, as an HSA, to become a member.
2. Describe a situation in which you have experienced stress in the workplace and how you handled that stressor. List ways in which you could have improved your handling of that situation. Provide helpful advice on one fellow classmate's experience.
3. Soft skills are difficult to define and measure. They include a positive attitude and the ability to interact and communicate productively, solve problems, and manage your time. The chart below lists 12 soft skills. Work with your group to define each one, and give a workplace example. Finally, using a scale of 1 to 10 (10 being your strongest skill and 1 your weakest skill), rate yourself on each soft skill. The first item is given as an example.

Rating	Skill	Definition	Example
3	Motivation	helps guide and maintain goals	taking a course to enhance current knowledge of office procedures
	Communication		
	Positive attitude		
	Strong work ethic		
	Teamwork skills		
	Interpersonal skills		
	Integrity		
	Flexibility and adaptability		
	Problem solving		
	Empathy		
	Initiative		
	Neatness and organization		

4. Using the Association of Administrative Assistants' website, provide a description of the association, including its mission statement and some of the upcoming calendar events.

5. You have just secured a full-time job in a fast-paced health services office. Your hours of work are Monday to Friday from 8:00 a.m. to 4:00 p.m. each day, with a half-hour unpaid lunch. You start to notice that other employees are showing up late, leaving early, and taking extended breaks. How do you handle this situation?
6. Organize the following list of tasks and duties in order of priority.
  - a. Organize the list of tasks and duties in order of priority on the planner provided. Using your time management skills, group similar tasks together to save time, and designate an approximate amount of time for each task. If you run out of time, list any tasks that you feel can be put off until tomorrow.
  - b. Organize the list of tasks and duties using the Priority Matrix.
  - c. Which of the two ways to manage time do you feel is most useful?

Note: It is Tuesday, and the workday is from 8:00 a.m. to 4:00 p.m., with a half-hour lunch from 12:00 to 12:30. Time slots are 15 minutes each.

List of tasks and duties:

- Enter Dr. Lee’s OHIP billing
- Clean Reception toy area
- Create new files for patients G. Wong, T. Vanduzen, T. Perry
- Clean kitchen area
- Stock examining room cabinets
- Call next-day morning appointment patients to confirm appointments
- File morning patient files
- Organize waiting room chairs
- Cover Reception for Jamie from 1:00 to 1:30
- Fax prescriptions to pharmacy from morning appointments
- Book referral appointments for Dr. Lee from the morning
- Update office manual with new protocols from last staff meeting
- Book nursing interviews for next Friday (3 in total)
- Update Dr. Lee’s PPT medical rounds lecture in three weeks
- Enter Dr. Nagy’s OHIP billing
- Tackle the old pile of non-urgent documents
- Create new files for “renovations” and “invoices”

Task	Time Allotted	Time
		8:00–8:15
		8:15–8:30
		8:30–8:45
		8:45–9:00
		9:00–9:15
		9:15–9:30

Task	Time Allotted	Time
		9:30–9:45
		9:45–10:00
		10:00–10:15
		10:15–10:30
		10:30–10:45
		10:45–11:00
		11:00–11:15
		11:15–11:30
		11:30–11:45
		11:45–12:00
Lunch	30 min	12:00–12:15
		12:15–12:30
		12:30–12:45
		12:45–1:00
Cover Reception for Jamie	30 min	1:00–1:15
		1:15–1:30
		1:30–1:45
		1:45–2:00
		2:00–2:15
		2:15–2:30
		2:30–2:45
		2:45–3:00
		3:00–3:15
		3:15–3:30
		3:30–3:45
		3:45–4:00
Tasks for tomorrow:		