 RIGHT ACCORD

**Operations Manager**

Position Contract

By and between the Operations Manager (This Position) and the CEO.

# Result inherent to this position (Position Statement)

To help retain long-term quality clients by effectively executing systems related to service inquires, billing, payroll, caregiver recruitment, caregiver retention and scheduling and other such systems that support the overall operations of Right Accord.

# Work Inherent In This Position

1. Assist CEO in the overall day to day operations of the organization
2. Responsible for taking service inquiry calls from prospective clients and turning them into new client assessments.
3. Responsible for all duties related to service inquiry calls including taking the initial Service Inquiry Calls, sending information to new prospects, following up with the prospects, setting new assessments, and inputting information in ERSP.
4. Oversight in New Client Onboarding process, handle client complaints and assist in creating Raving Fans for Right Accord.
5. Responsible for recruitment and retention initiatives to generate new hires on an ongoing basis utilizing recruitment tools available.
6. Responsible for coordinating all scheduling activities with the Staffing Coordinator and tracking these updates and changes in the scheduling system.
7. Oversight over all interoffice purchases. This includes all office supplies and other items.
8. Oversight and management of all new hire paperwork, employee files, client files and genral office files.
9. Conduct Annual Performance Reviews of Employees and perform Disciplinary Actions when necessary.
10. Responsible for the maintenance and accuracy of the scheduling system
11. Oversight of all employee benefits, including supplemental and health benefits, Unemployment claims and workers compensation claims
12. Responsible for assisting the CEO in keeping all manuals up to date and accurate.
13. Responsible for reporting directly to the CEO on all the duties listed above on a weekly basis.

# Standards/Behavior Inherent In The Position

## Dressing Standards

* 1. Business Professional dressing standards. No jeans, shorts, t-shirts, halter or sleeveless tops.
	2. Must wear company supplied name badge during working hours.

## Behavior

1. Inappropriate language, jokes, and the like are prohibited. Such behavior presents a very unprofessional image and would reflect poorly on Right Accord.
2. You must never discuss your salary/wages with anyone but with your direct Administrator and the CEO. This information is confidential.

# Position-Specific Standards

## Service Inquiry Standards

1. The Operations Manager is accountable for getting assessment appointments scheduled between the prospective client and the CEO. It is expected that assessments will be scheduled for 80% of the service inquiry calls. The Office Manager, in the SI Report, must track this.
2. The Operations Manager will be accountable to the CEO, via the SI Report on all activities relating to the SIF calls.
3. Once an SIF call is taken, the Operations Manager is responsible for making sure that the information from the SIF is immediately inputted into our contact database, ERSP. This includes scheduled assessments, family contact info, client contact info, and most importantly, “the sales opportunity” information.
4. The Operations Manager is responsible for keeping all “sales opportunity” info in ERSP up to date for all prospective clients who have not yet had their assessments. After an assessment has been done, the CEO/Care Coordinator assumes responsibility for keeping this information up to date and following up with the prospect if they have not signed on for services.
5. After the SIF call, the Operations Manager is responsible for making sure that the appropriate packet of information is sent out the prospective client the same day the client called.
6. After the prospective client has received their information packet, the Administrator is responsible for following up with them to make sure they got their packet and to again try and schedule an assessment for the CEO and tracking these calls in the ERSP! database.

## Payroll Standards

1. Administrative Concepts main point of contact. The Operations Manager is to correspond directly with Administrative Concepts regarding issues pertaining to PC Payroll software and other such areas relating to payroll
2. Inputting payroll. Every other Monday, Operations Manager is responsible for ensuring that the data from our scheduling system is 100% accurate and properly entered into Administrative Concepts PC Payroll Software.
3. Timely payroll. Responsible for submitting accurate payroll to Administrative Concepts no later than 5pm on payroll Tuesdays. In case of a holiday falling on Monday, Payroll is due by 5pm on Wednesdays.
4. Overall payroll management. Responsible for handling all issues relating to payroll. This includes errors, cancelled checks, manual checks, etc.
5. Payroll reports. Responsible for generating accurate payroll reports as directed by the CEO.

## Billing Standards

1. Invoicing. Office Manager is responsible for ensuring that the data in the scheduling system is 100% accurate and properly downloaded into QuickBooks every “Billing Wednesday.”
2. Credit card transactions. Responsible for making sure that those clients, who pay by credit card, are charged properly before invoices are printed out.
3. Timely billing. Responsible for getting billing to the Post Office before 5pm on “Billing Wednesdays.”
4. Collections. Responsible for generating letters, phone calls, and all correspondence to responsible parties who are behind more than 15-days on their bills. Also, responsible for communicating with (30 days or more) delinquent clients to the CEO so proper action can be taken to ensure their timely payment.
5. Accounts Receivable. Responsible for taking payments, entering them accurately into QuickBooks, and making sure they are deposited in a timely fashion.
6. Overall billing management. Responsible for handling all issues relating to billing. This includes taking client billing phone calls, correcting errors, etc.
7. Billing reports. Responsible for generating accurate billing reports as directed by the CEO.

## Scheduling Standards

1. The Operations Manager is responsible for documenting these changes using the “Schedule Change Form” with each ongoing schedule change and files it in the appropriate area. The Administrator is expected to know who all the available caregivers are and use their better judgment on making the appropriate assignments and to work closely with the Staff Coordinator on schedule changes.
2. The Operations Manager is responsible for making sure all the Care Plans, Schedules, Authorizations, Notes, and other areas are accurately input into the scheduling system and tracked properly.
3. The Operations Coordinator is responsible for understanding and effectively using our timekeeping system. The Supervisor must utilize this system so that all information is 100% accurate for billing and payroll purposes and

also to make sure that caregivers are arriving and leaving their shifts in accordance with their previously arranged schedules.

## Purchasing Standards

1. The Operations Manager has oversight over all purchases relating to office supplies and other items that support the other two departments. However, the CEO must approve all purchases that fall outside the purchasing budget. The CEO must also approve all items that exceed $75.
2. The Operations Manager is also responsible for keeping up to date on the best prices available for the products we need. The Office Manager must negotiate these prices with our vendors and find the best reasonable prices while still getting equal value.

## Record Keeping

1. The Operations Manager is responsible for creating, tracking, and reviewing all new hire paperwork. It is imperative that the Operations Manager make sure that before a new hire leaves, that all the appropriate paperwork has been properly filled out correctly, etc. If there are items missing from their paperwork, (like a driving record, TB test, etc.), it is the responsibility of the Operations Manager to correspond with the new hired caregiver to make sure that whatever is missing is promptly received and filed properly.
2. Once new hire paperwork and documentation has been received, it is the responsibility of the Operations Manager to track and notify Caregivers of items that are expired and need updating.
3. The Operations Manager is responsible for ensuring that internal office Client Files are created for each client and organized according to the guidelines. He/she is also responsible for the maintenance and organization of each section of the Client Files.
4. The Operations Manager has oversight over all employer sponsored benefit programs. This includes supplemental and health benefits and perhaps a 401k plan in the future. It is the responsibility of the Operations Manager to communicate between the employees and the applicable providers to make sure that all enrollments, withholdings, and anything else pertaining to benefits are done properly and within Florida State law.
5. It is expected that the Operations Manager will need to address new hired caregivers, during the weekly orientation, regarding benefits, payroll, and other matters under his/her jurisdiction that affect the caregivers directly. The Operations Manager will be responsible for scheduling the appropriate time with the Staff Coordinator/Care Coordiantor during this orientation. The amount of time needed during orientation shouldn’t exceed more than 10 minutes.
6. The Operations Manager is expected to assist the CEO with the creation, updating, and organization of all manuals pertaining to each office staff position. This includes creating forms and updating instructions as directed by the CEO.
7. The Operations Manager is responsible for assisting the CEO in whatever duties that allow him to more effectively move Right Accord closer to its Strategic Objective.

# General Standards

1. All work will be orchestrated, documented and quantified toward the achievement of the company’s strategic objective. Orchestration means all routine activities will be documented and managed within the structure and context of the operations manual. All systems documentation will be formatted according to company templates.
2. All work will be performed in accordance with all government laws, regulations, ordinances, and court rulings in those jurisdictions in which the company operates.
3. All work will be performed according to company policies and standards inherent in all position contracts, action plans, employee manuals, ongoing policy memorandums, facilities and dress codes, as well as in the vision and spirit of the company’s strategic objective, company story and positioning statement.
4. All client materials and information will be held as *strictly confidential* outside the company. The information included in the operations manual is proprietary.
5. All telephone calls, both internal and external, will be returned within one business day and within two hours whenever possible.
6. Your director will be notified of any issues to be resolved or deadlines that cannot be met by reportee *prior to the due date.*
7. All Policy Memorandums indicating changes in policy and/or procedure will be stored in each employee's Manual until which time an updated procedure is provided.
8. Employees will provide staff assistance as requested, with a spirit of helpfulness. This means each employee may be asked from time to time to cover in other areas of accountability and/or departments as a matter of exception, not routine.
9. All business communications, whether verbal, visual or written, whether for internal or external use, will be professional in tone and content and according to any applicable and existing company policies and standards.
10. Employees will respect each other’s time, space and need for concentration. Socializing and interruptions must not impede workflow.
11. Employees will have weekly, regularly scheduled meetings with their director.
12. Employees are encouraged to recommend ideas for the vision of the company, innovations and improvements within their department and position that are consistent with the company’s Strategic Objective. Innovation is encouraged and can be an ongoing process.

Signing on behalf of the Operations Manager and agreeing to accept all its accountabilities is:

Signature Date

Name (please print)

Signing on behalf of the CEO and agreeing to accept all its accountabilities is:

Signature Date

Name (please print)