

**Position Title:** Call Centre Patient Care Lead (Manager)  
**Reports to:** Operations & Compliance Manager  
**Version:** May 2023

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### **Company Overview**

*At The Clinic Network (“TCN”), a division of Pathway Health, we are committed to delivering personalized care to help improve a patients' quality of life. We strive to provide patients with timely access to personalized treatment plans using advanced and clinically-proven solutions to achieve the best outcomes.*

*Pathway Health is one of the largest providers of out-of-hospital pain management services in Canada. We own and operate nine community-based clinics across four provinces where our team of health professionals work together to help patients by using a variety of evidence-based approaches. Our patient care programs utilize an interdisciplinary approach that includes trained pain specialists, physical and occupational therapists, psychologists, nurses and other healthcare providers. Pathway Health has also developed an expertise in harm reduction where medicinal cannabis is being used as an alternative to traditional opioids.*

The Clinic Network is actively looking for a Call Centre Patient Care Lead within our Call Centre.

### **Overview:**

The Patient Care Lead is a key stakeholder in the development of PHCs sales license call center. The Patient Care lead is responsible for the management of a PCR (CSR) team and the supporting call center infrastructure. The Patient Care Lead is responsible for working in line with the company and Nurse Practitioners (“NP”), Physicians (“DR”) of TCN to help provide guidance to their PCR team dosage and preferred consumption of medical cannabis. Ensure that the standards of front-line communication to our various customers including medical patients, caregivers, NPs, DRs, is maintained. Responsibilities include supervising the Patient Care Representatives, ensuring that Cannabis Regulations are adhered to while ensuring that the customer relationship is managed, accurate and appropriate information is provided, and transactions are completed. The Patient Care Lead will support in the development and implementation of strategic sales initiatives and tools. Will act as a key point of contact between call center partners. Perform Lead administration tasks as needed.

In addition this role will function as the first line of escalation and response to questions and queries from the PCR Team; as well as providing training to new hires, updating/implementing SOP's for the team.

*Role may be in a hybrid virtual and/or physical environment dependent upon the needs of the business and requirements of the Federal & Provincial Regulatory bodies.*

All responsibilities identified below are for the Company; however, there maybe some cross over related to operating subsidiaries

### **Here are a few ways you will make a difference**

#### **Key Responsibilities**

##### **Compliance, Stakeholder and Call Centre Initiatives**

- Key stakeholders in the development of PHCs sales license call center
- Support in the development of strategic sales initiatives and campaigns and executes through PCR team
- Work with IT and PCRs from PHC and call center partners to ensure functionality of call center and ERP infrastructure
- Triage and troubleshoot escalation in coordination with partner PCR specialists, escalating highest priority to Operations Lead
- Support Product and Education Leads to script product detailing and pitches

- Support Compliance and Regulatory Leads to monitor patient-PCR calls and pitches for internal Quality Assurance and Health Canada compliance
- Responsible for implementing PHC compliance and operations training (as per SOPs) and upholding requests from call center partners
- Responsible for meeting sales targets

### **Call Centre Lead Support**

- Support and/or perform clinic administration duties as required
- Develop business KPI's for yourself and the team that are tied directly to the KPI's of the division
- Develop and analyze key metrics relating to the Clinic and Virtual environments with monthly reporting
- Record loss, theft, complaints, and pharmacovigilance related matters and direct to the LP of record
- Support in the drafting of scripted oral and written patient facing marketing materials or FAQ responses for internal regulatory approval
- Participate in production of departmental policies and documentation (SOP, education resources etc)
- Connect with and work with other divisions to enhance the clinic / patient experience
- Ensure an active watch in the marketplace to capture and compile LP news, promos, new products etc. to be distributed to all locations
- Lead education campaign for NP model
- Manage Input Health Education inbox
- Organize and manage PCR pool (assist in scheduling arrangement)
- Recruitment of new Call Centre team members
- Guide, support and coach the Patient Care Representatives to solve problems that affect service, efficiency, and productivity
- Contribute to growth and profitability through the mentoring and coaching of staff
- Implement training for development of staff to meet established patient sales, Key Performance Indicators and product knowledge standards
- Provide PCR's with methods on the execution of tactical sales routines, best practices processes and procedures and any other assigned administrative and operational tasks within the company
- Ensure prompt and accurate processing of patients' transactions and inquires through a variety of mediums by the Patient Care team
- Ensure the processing of medical documents is completed accurately, efficiently and in compliance with Cannabis Regulations
- Responsible for administrative and operational responsibilities, and ensures that required audits and reports are completed and successful in accordance with Cannabis Regulations
- Manage PCR scheduling to ensure the Patient Care departments is adequately staffed at all times
- Address escalated situations with patients and customers
- Ensure regular quality assurance monitoring of incoming/outgoing calls, digital communications, following of SOP's and patient orders
- Maintain and support the drafting of internal marketing materials (cheat sheets/sell sheets), sales pitches, positioning of special promotions, and training tools as needed with key stakeholders (Marketing, RPIC, LP Liaison etc.)
- Provide training to the PCR, DPCR and IPCR team members on these tools for training and continuous improvement
- Provide education to patients regarding medical cannabis, consumption methods outlined by the physician, options for licensed producers, and answer any questions that are aligned with their use of the medical document
- Assist PCR's in the education to patients on cannabis as needed:

- Assessments
- Knowledge
- Use
- Strains
- Assist the PCR's on educating patients on Licensed Producers:
  - Product lines
  - Product availability
  - Online ordering process
  - Receipt of product process
  - Product pricing, including veteran, low income, disability programs
- Educate on grow for self-option
- Assist patients and family members (where applicable) with concern and empathy and with respect to their confidentiality and privacy
- Using sales techniques, ensure patients have registered with one (1) or more Licensed Producers, add their selection of products to their cart and process payment before finalizing the call
- Understand the use of Electronic Medical Records (EMR) – patient look up and data entry
- Ensure that all documentation is complete and accurate
- Provide patient follow up and quality assurance as required
- Assist with community, medical and non-profit presentations
- Ensure Health Canada documentation is complete and accurate
- Liaison between patient, MD/NP and LP as required by patient
- Support and/or perform clinic administration duties as required
- Any other tasks as assigned by Management

### **Abilities and Knowledge**

- Ability to coach team members so that they perform to Company standards
- Proven understanding of Sales methods in closing a sale
- Must have strong and demonstrated interpersonal, professional communication etiquette and strong listening skills
- Highly motivated and self-directed, capable of multi-tasking, and able to work with minimal supervision
- Strong knowledge of the Cannabis Act and Regulations as well as the Health Information Act
- Knowledge of medical cannabis and licenced producers is an asset
- Maintain a high level of product and service knowledge
- Maintain a professional appearance, demeanour, and attitude at all times
- Ability to analyze and interpret the needs of patients and offer the appropriate options, solutions, and resolutions required
- High level problem identification and issue resolution skills
- Strong work ethic and positive team attitude
- Proven ability to effectively use Microsoft Office Applications
- Perform the described responsibilities in a professional, competent and timely manner
- Ability to be disciplined, to remain calm in difficult situations and work in a high stress environment
- High level of integrity, privacy, confidentiality and accountability
- Highly flexible, adaptable with solid interpersonal skills that allow one to work effectively in a diverse working environment
- Must have strong administrative abilities with high attention to detail/accuracy and analytical thinker
- Ability to work independently as well as part of a team when required
- Must have knowledge of EMR software, InputHealth experience an asset
- Excellent work performance and attendance
- Bilingual (Fluent in both French and English) considered an asset

**Education and Experience:**

- Prior people management experience
- Post – secondary education in related field is an asset
- Ongoing education on LP's and Products
- Sales techniques and marketing experience
- Minimum 3 years' cannabis call center experience preferred, including strong knowledge of retail sales principles, methods, practices, and techniques

**Work Environment**

- Majority of work will be performed in an office / home office environment. Some travel may be required

**Requirement**

- All employees /consultants / allied partners working within any of our offices or clinics must be fully vaccinated and provide proof of vaccination
- Under health & safety legislation, employees / consultants / allied partners working within any of our clinics or places of work have an obligation to ensure the safety of themselves and those around them, which includes the assurance that they have immunity to the covid-19 virus, unless there is a medical or religious reason not to
- If this is the case, a conversation with Human Resources is required to discuss and determine how we can ensure your protection and the protection of those around you

**\*\* Management reserves the right to change the scope of the role acting reasonably. \*\***

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