



Delegating tasks in the office!

CHERYL BAILEY, PMAC

ASPMA JOURNAL EDITOR

CHERYLBPMAC@GMAIL.COM



“ Delegating doesn't mean passing off work you don't enjoy, but letting your employees stretch their skills and judgment. ”

HARVEY MACKAY

This is the first step in understanding delegating!



DO YOU
DELEGATE?



Tips for Delegating

Levels~ Types of delegating

- 1) **Instructional ~No Freedom "Do exactly what I Say"**
- 2) Investigation & analysis~ Person delegating retains responsibility "Look into this and let me know what you find out, I'll decide."
- 3) Encourage & enables~ Person looking into it and delegator decide together. "Look into this and we'll decide together."
- 4) Analysis & decision-making~ both people agree on decision "tell me the situation and what help you need for me. Then we'll decide"
- 5) Analysis & Recommendation~ delegate makes recommendation looks for approval. "give me the situation & recommendation. I'll let you whether to proceed."
- 6) Analysis, recommendation~ Delegate makes decision. "decide & let me know your decision, wait for my go ahead."
- 7) Analysis, recommendation, decision~ "decide and let me know what your decision is, go ahead unless I say otherwise."
- 8) Decide & Act, report~ "let me know what happened and the action you took"
- 9) Decide & Act ~ "take care of it not need to report back"
- 10) Your responsibility~ "this is your area of responsibility, it's up to you to handle the entire situation from start to finish."

Decide what needs to be delegated

- Don't assign most critical, time-sensitive tasks if you are new to delegating.

Don't delegate something Monday night that's due Tuesday am .

- Pick the right people for the tasks you need to delegate.
- Select confident, self-motivated and independent people.
- Make sure you know the strengths and weaknesses of the people you pick.



Pick the right People



Communicate.

Communicate clearly

- Be up front about your expectations this include timelines and due dates.
- ▶ Put it in writing if you can, this will help with the end result being accurate and on time.
- ▶ Make sure that you are clear and that the receiver is understanding what you are saying.

Check in

- Check in periodically to make sure everyone is on track and answer any possible questions they have.

Giving Credit when credit is due!

- This alone will tell someone if they want to help/work with you. Make sure you NEVER take credit that's not yours to take.
- Sharing responsibility is great if accolades are also shared.



Be Patient & Understanding

- ▶ Be understanding, yet address issues or problems when they arise. This will help others learn from them.

Points of delegating

- **Why we need to delegate.**
- **What we should delegate.**
- **When to delegate.**
- **When you shouldn't delegate.**
- **How you delegate.**

Reasons why we need to
Delegate tasks to staff & Co-
workers!



Confidence



Delegating builds confidence in your staff & Co-workers.

- Knowledge
- Self Esteem at work
- Happier

Delegating
helps build
team skills!



- 
- The importance of team work can't be express enough!
 - No practice can survive long term without team work!
 - Involvement increases ownership and commitment to the workplace.
 - Learn to work better as a team, help each other, look out for one another.
 - Knowing that other people are depending on them.
 - Your team needs to realize that having a task given to them is not a punishment. It does however, need to be a task that they can handle.



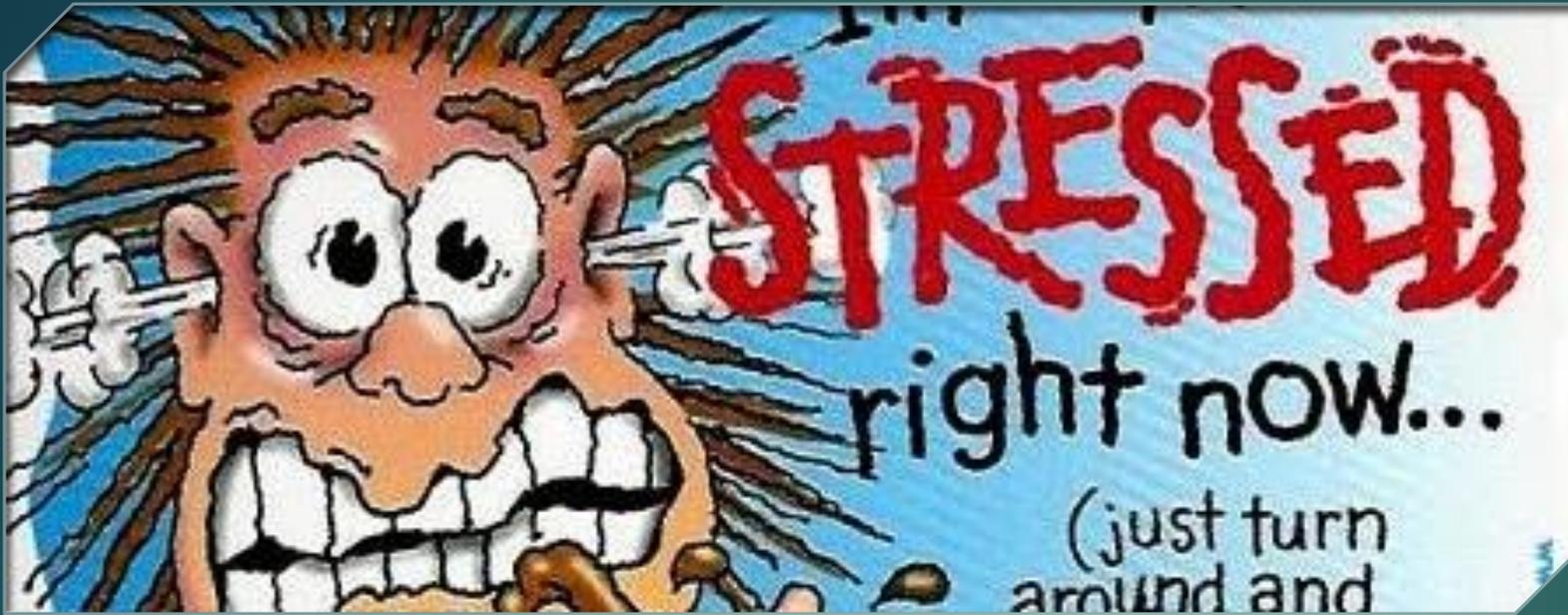
Delegating
offers a chance
for staff & co-
workers to grow!

- Ability to learn & seek out new things

**“THE BEST WAY TO
FIND OUT IF YOU CAN
TRUST SOMEBODY IS
TO TRUST THEM.”**

~ Ernest Hemingway
American author

Delegating
builds Trust



Delegate because You alone
can't do everything!

- Your stress level will decrease



Empowering

- ▶ Knowledge that you trust and depend on them
 - ▶ This can be difficult for some
 - ▶ Others will blossom

A photograph of a plate with four hot dogs. One hot dog is placed on top of the other three, which are arranged in a row. The text 'Delegating is taking stuff off your plate and putting it on someone else's.' is overlaid on the image in a white font with a black background. The plate has a colorful patterned border. The background is a white napkin.

Delegating is taking stuff off your plate and putting it on someone else's.

Leadership Freak

What
should you
delegate?



What do you delegate?

Tasks you should and can delegate

Tasks that DON'T require just your attention!

- Entering insurance into the computer.
- Calling patients about appointment related topics.
- Pulling EOB's for secondary insurance.
- Prepping office for day.
- Stocking of rooms.
- Ordering items.
- Ordering tests

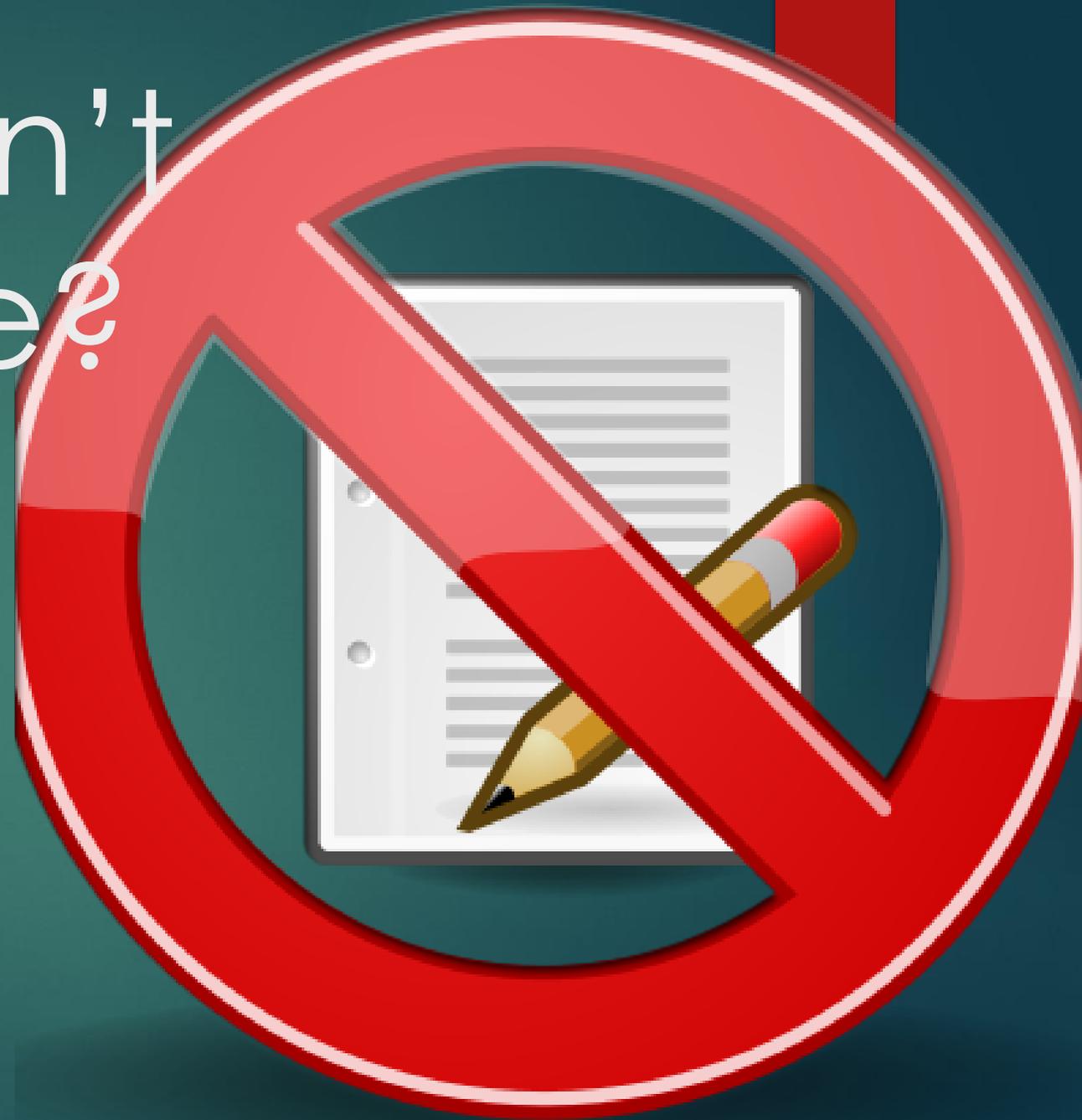
When should
you delegate?



When to Delegate?

- BEFORE YOU GET STRESSED OUT!!!
- CO-WORKER IS ASKING FOR MORE TO DO!
- AFTER THE PERSON IS TRAINED. (NEVER OVERLOAD SOMEONE)
- EMPLOYEE CO-WORKER IS BORED/ NOTHING TO DO.
- YOU FEEL THEY NEED MORE OF A CHALLENGE.
- YOU HAVE A DEADLINE THAT IS APPROACHING.
- A LOT OF EMPLOYEE CHIT CHAT GOING ON

When shouldn't
You delegate?



When it is your task alone to do!

- PAYROLL
- REPRIMANDING AN EMPLOYEE
- COMPLAINTS (PATIENT, STAFF,
DOCTOR)
- BILLING



NEVER
DELEGATE A
Task
BECAUSE You
don't want
to do IT!



How do
you
delegate?

How to delegate!

- NEVER TELL a co worker what to do ALWAYS ask them.
- Make sure the co-worker is trained how to do the task
- Make sure they feel comfortable
- Don't get mad at a co-worker for asking questions, this will make you unapproachable.



Thank you!

Cheryl A Bailey, PMAC
ASPMA Journal Editor
cherylbpmac@gmail.com