

# Patient Services Officer

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Job Advert



Western Isles Hospital, Macaulay Road, Stornoway, Isle of Lewis, HS1 2AF

PATIENT SERVICES DEPARTMENT

## Patient Services Officer

**Band 2 – £25,694 - £27,900 pro rata**

**Plus £1,406 Distant Islands Allowance pro rata**

**37 Hours per Week**

We are looking for a motivated, friendly person who enjoys the challenge of working as part of a team in a changing environment.

Ideally, you have a good general education, experience of working with the public in an administrative role, have demonstrable good communication skills and enjoy working in a busy environment. Computer literacy and attention to detail are essential.

The successful candidate will be based in Medical Records, Western Isles Hospital.

Training for the position will be provided in-house. This post is subject to Disclosure Scotland checks.

For further information please contact: Nicola Murray, Patient Services Manager, NHS Western Isles. Tel: 01851 704704. This post is not eligible for relocation expenses.

The successful applicant will be required to register with the PVG Scheme (Protecting Vulnerable Groups Scheme). This post is not eligible for relocation expenses.

All NHS Western Isles vacancies appear on the NHS Scotland website: [apply.jobs.scot.nhs.uk](https://apply.jobs.scot.nhs.uk), along with a job description.

Tha beàrnan-obrach NHS Eilean Siar uile gu léir a' nochdadh air làrach-lìn NHS na h-Alba <https://apply.jobs.scot.nhs.uk/>, còmhla ri dealbh-obrach.

If you have any further queries, please contact Tel: 01851 762027.

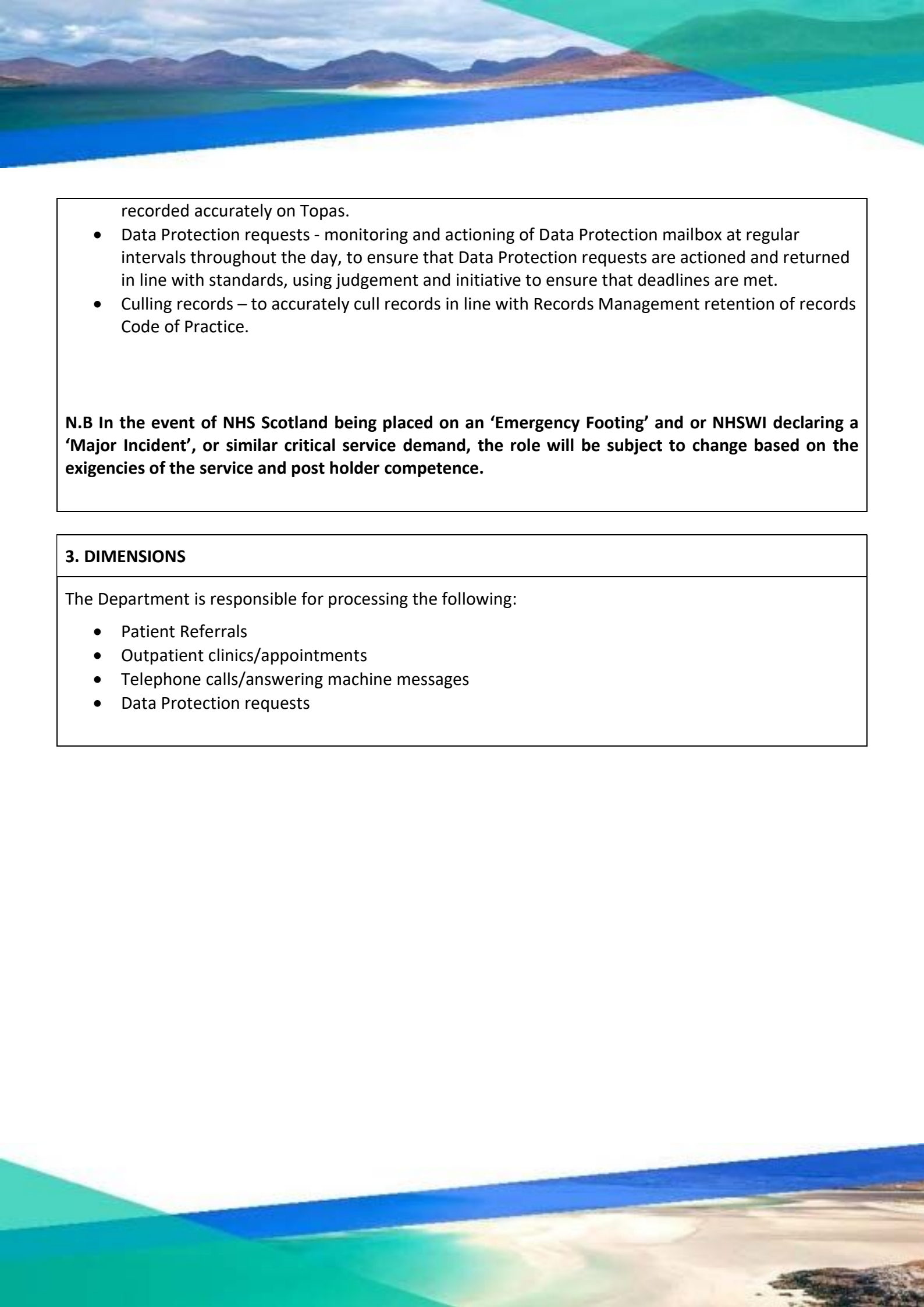
## 1. JOB IDENTIFICATION

Job Title:	Patient Services Officer
Responsible to (insert job title):	Patient Services Manager
Department(s):	Patient Services
Base:	Western Isles Hospital
Operating Division:	Acute
Job Reference:	
No of Job Holders:	7
Last Update (insert date):	08.09.2025

## 2. JOB PURPOSE

To provide a comprehensive Health Record service for both inpatients and outpatients. There are distinct area of responsibilities and staff work on a rotational basis across all areas of responsibility:

- First point of contact for Health Records. Responding to queries from patients and staff in relation to outpatient appointments, inpatient admissions and general health record queries.
- Appointments – monitoring and actioning of Appointment mailbox at regular intervals throughout the day. To action outpatient appointments in line with Waiting Times guidance. Communicating appointment bookings via telephone and/or letter and accurately record clinic outcomes.
- Referrals Management – monitoring and actioning of Referral Management System at regular intervals throughout the day to action all referrals made to NHS Western Isles, using initiative and judgement to action appropriately or return to referrer. Continually monitoring referrals and processing reminders to services if referrals are not actioned in line with standards.
- Outpatient clinic preparation – to action outpatient clinic preparation of records, to ensure the required records are available, accuracy of records, completeness of clinic records and inclusion of clinic specific documentation. Using initiative and judgement to locate missing patient records.
- Filing - ensure accuracy of filing loose records in patient record in line with case note filing standards.
- Maintaining record storage. Ensuring filing bay is in good order to enable effective and efficient retrieval and location of records.
- Deceased Patient case notes – monitoring and actioning of Deceased Patient mailbox at regular interval throughout the day, recording accurately on Topas and ensuring storage of deceased records are well maintained to enable effective and efficient retrieval and location of records. Ensuring that deceased records are archived to the Deceased Store on a regular basis and



recorded accurately on Topas.

- Data Protection requests - monitoring and actioning of Data Protection mailbox at regular intervals throughout the day, to ensure that Data Protection requests are actioned and returned in line with standards, using judgement and initiative to ensure that deadlines are met.
- Culling records – to accurately cull records in line with Records Management retention of records Code of Practice.

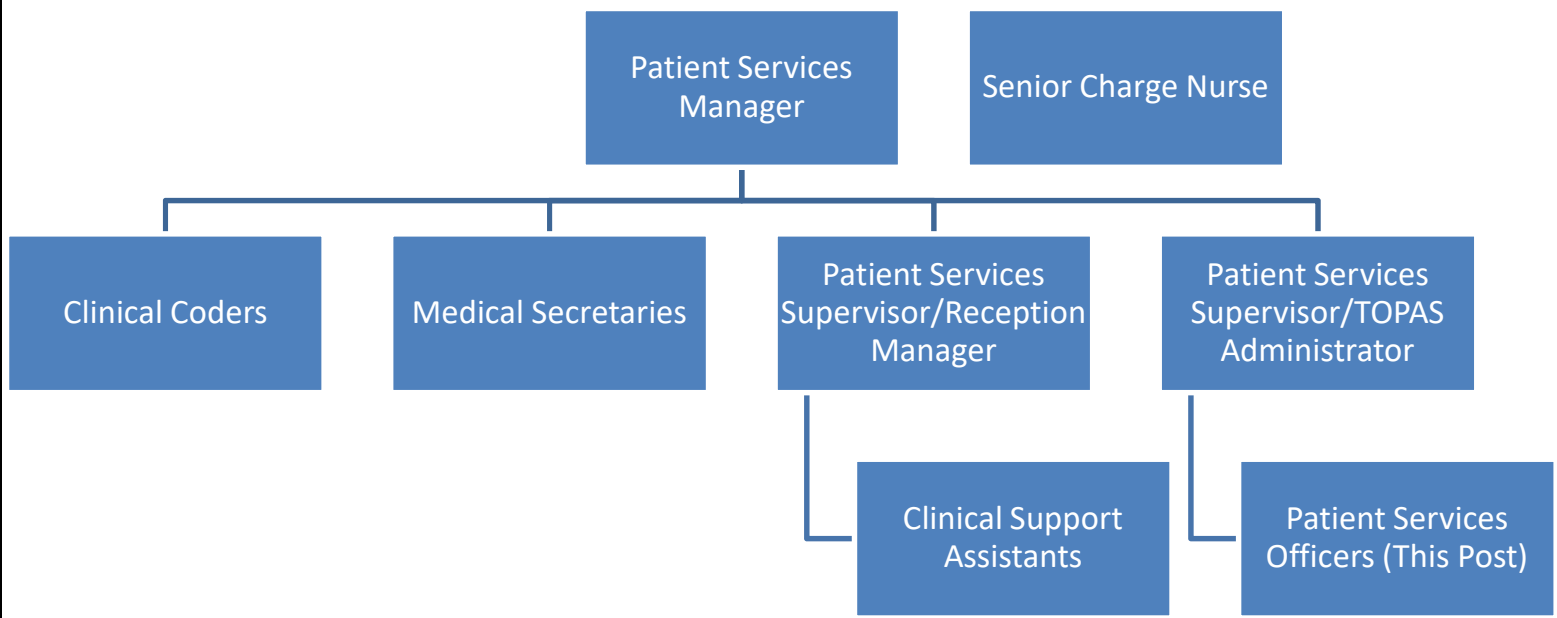
**N.B In the event of NHS Scotland being placed on an ‘Emergency Footing’ and or NHSWI declaring a ‘Major Incident’, or similar critical service demand, the role will be subject to change based on the exigencies of the service and post holder competence.**

### **3. DIMENSIONS**

The Department is responsible for processing the following:

- Patient Referrals
- Outpatient clinics/appointments
- Telephone calls/answering machine messages
- Data Protection requests

#### 4. ORGANISATIONAL POSITION



## 5. ROLE OF DEPARTMENT

Health Records is responsible for the provision of key services supporting patient care and management, including:

- Providing a comprehensive medical records library service,
- Providing case records, with all supporting information, for inpatient/day case admissions and outpatient attendances at WIH & OUAB.
- Processing requests for case records from other hospitals in Scotland
- Processing all referral letters and appointments for new and return patients at consultant clinics,
- Clinical coding and collating in-patient/day case/out-patient data for submission to Information and Statistics Division (ISD) for utilisation by management both locally and nationally for the monitoring of performance/guarantees/targets and to assist with future health care provision planning,
- Handling Subject Access Requests in accordance with the provisions of the Data Protection Act/Access to Health Records Act/Freedom of Information Act,
- Processing court orders and information requests from courts/procurators fiscal /police/solicitors/insurance companies/Criminal Injuries Compensation Authority/RTA compensation unit/government departments etc.

## 6. KEY RESULT AREAS

The post holder is required to work in the following areas within the Health Records Department as part of the staff rotation:

### Front Desk

- Provide signposting support for outpatient clinics.
- Deal with outpatient clinic enquiries in an appropriate and confidential manner.
- Provide travel expense forms and ensuring that forms are stamped appropriately.
- Monitor messages on the answering machine, accurately record and respond as appropriate.
- Transfer incoming telephone calls as required.
- Updating Topas demographics when notified by patient or by GP.
- Assist with moving and cancelling appointments during busy periods

### *Appointments Desk*

- Book appointments using TOPAS software, using initiative, from ticket hopper in line with Waiting Times Code of Practice, considering reasonable offers and priority.
- Move or cancel appointments and/or clinics often at short notice.

- Process return appointment letters. This may be Docmail mail system or manually printing and posting of letters depending on time constraints.
- Enter information on Topas from the outpatient clinics Outcome Sheets provided by clinician and action as appropriate.
- Responsible for actioning incoming calls in relation to appointments

#### *Referral Management System Desk*

- Constantly review incoming referrals and allocate to appropriate service or Consultant for vetting, frequently this requires judgement when the referring GP hasn't specified.
- Respond to referral breach report by providing reminders to services where referral have been actioned in line with standards, escalating to line manager where referrals remain unactioned by Service or Consultant.
- Respond to vetted referrals by actioning Clinicians decision- and notifying referrer as required.
- Process new appointment letters. This may be Docmail mail system or manually printing and posting of letters depending on time constraints.
- Matching patient demographics provided on referrals and information currently held on Topas and ensuring demographic data is up to date.

#### *Clinic Preparation Desks*

- Locate, prepare and collate patient notes for Outpatient clinics. Supply patient notes and other patient data for admissions ensuring they are complete and secure. Using own initiative to locate clinic records not in scanned location. Mix of computer and manual processes.
- Transport prepared Patient Notes with appropriate documentation to the Outpatient Department, Renal or Diabetic Units before the start of the clinic.
- General administrative duties associated with the area (Scanning, filing, photo coping and telephone enquiries)
- File incoming patient notes in the file store.
- Respond immediately to urgent requests for notes or labels.
- Assist staff from other departments when preparing notes for audits.

#### *Filing, Culling and Photocopying Desk*

- File additional information into patient notes both within Medical Records and the wider hospital.
- Ensure that notes do not get too large and split notes as required in line with guidance and procedures.
- Culling records in line with Records Management Code of Practice.
- Assist and cover for all areas at busy times

#### *Data Protection/deceased notes management*

- Photocopy notes as required by Public Health for Subject Access Requests/Data Protection and prepare copy records for return to Information Governance.
- Monitor deceased patient mailbox and action as required: Locate, mark, move and cull old and

deceased notes following current NHS Scotland Record Management Retention guidelines.

- Maintain the deceased file store.
- Locating, preparing, packing and dispatching patient records for clinics/wards out with NHS Western Isles.
- Assist and cover for the Front Desk especially at busy times. Covering all Front desk duties.

Patient Services Officers have the responsibility to:

- Assist in training all new staff in the areas mentioned above as and when required.
- Monitor and maintain the case note tracking system and highlight any misuse of the system. This involves dealing with all levels of staff from ward clerks to consultants, ensuring they are reminded to always track case notes.
- Maintain knowledge of Waiting Times guidance as set out by the Scottish Government to ensure that practices and procedures follow guidelines and no patient breaches national waiting targets.
- Non Budget Holder
- Non Line Manager
- Attends, and or completes all required NHS Western Isles mandatory training

#### **7a. EQUIPMENT AND MACHINERY**

#### **7b. SYSTEMS**

The post holder is required to use PC/VDU equipment, more or less continuously, throughout the day, working with a range of systems.

- Patient Administration System (PAS) – TOPAS
- SCI Store
- SCI Gateway
- Microsoft Office 365 – Excel, Word etc
- Mail management system – Docmail
- Telephone system
- Email – NHSmail
- Internet and Intranet

- Incident and Risk Management System
- TURAS

## **8. ASSIGNMENT AND REVIEW OF WORK**

The post holder is required to undertake all aspects of the post, managing own workload and referring to the Patient Services Supervisor or Patient Services Manager when necessary.

This is a role that staff work within well defined occupational procedures and codes of practice and the post holder will be expected to use their initiative, where there are non-routine requests that are out with the relevant procedure or code of practice and when to escalate issues to their line manager.

Participate in NHS Western Isles performance assessment / appraisal system

## **9. DECISIONS AND JUDGEMENTS**

The post holder is required to be mindful of the patient location and transport logistics and to have discretion with regard to:

- Scheduling clinic dates.
- Rescheduling/cancellation of clinical dates.
- Scheduling and rescheduling of appointments.
- Removing people from waiting lists as per Waiting Times guidance and referring them back to GP as required following non-attendance.
- Managing waiting lists and appointing from the waiting list ensuring national targets are met and ensuring that patients do not breach national waiting times.

The post holder is required to use their own judgment in the following areas:

- Deciding which Specialty a referral belongs to in case of ambiguity, or if the referral is required be returned to the referrer due to lack of information.

- Managing ticket hoppers to book appointments within national targets.
- Querying decisions where there is conflicting information or evidence.

### 10. MOST CHALLENGING/DIFFICULT PARTS OF THE JOB

Prioritisation of daily workload while appropriately dealing with competing demands. Maintaining concentration and accuracy, while having with regular interruptions  
 Managing patient expectations and communicating with anxious and/or upset patients.

### 11. COMMUNICATIONS AND RELATIONSHIPS

#### 7. COMMUNICATIONS AND RELATIONSHIPS

WHO	FREQUENCY	METHOD	WHY
Patients	Daily	Face to Face Telephone Written	Appointment allocation Appointment cancellation General enquiries Relaying information regarding treatment Directing to appropriate waiting areas Complaints
Carers/relatives	Daily	Face to Face Telephone	Where appropriate relaying details of appointments General information Complaints
Wards/Departments	Daily	Face to Face Telephone Written	Retrieving case notes Printing Labels Enquiries relating to Daily Bed State Arranging Outpatient appointments

Colleagues within and out with NHSWI	Daily	Face to Face Telephone Written Email	Retrieving case notes for outpatient clinics Clinical advice relating to consultant clinics General information relating to patients Various meetings regarding Waiting Lists/Times
Consultants	Daily	Face to Face Telephone Written Email	Clinic information General enquiries Relay telephone messages Information relating to patients/clinics Rescheduling of clinics Authorisation for release of Medical Records
GPs	Daily	Telephone Written Email	Patient Referrals Appointments Patient Information
Visitors	Daily	Face to Face	Giving directions to wards General Enquiries

The post holder will be required to contact patients in order to explain why their appointment may be being changed or cancelled. Some patients may get angry or aggressive and the post holder must have the skills to deal with this in a professional and caring manner.

## 12. PHYSICAL, MENTAL, EMOTIONAL AND ENVIRONMENTAL DEMANDS OF THE JOB

The post is physically demanding in that it requires almost continuous handling of patient records each weighing an average of 2kg.

Multiple sets of case notes are to be transported using a trolley.

There is a requirement to undertake overhead filing and retrieval of case notes with the use of a kick stool for working at heights.

There is a requirement to undertake filing and retrieval of case notes from ground level.

There is a requirement for the post holder to sit for prolonged periods while concentrating on a specific

task e.g. making appointments, clinic preparation or processing referrals on the Referral Management System.

The post holder is frequently exposed to verbal abuse from patients and relatives dissatisfied with aspects of hospital services and patient expectations in relation to cancelled clinics and waiting times.

The post holder is frequently exposed to images and confidential, and often upsetting information, contained within case notes.

Concentration is required when entering patient referrals and appointments into the computer system, there are regular interruptions from phone and other staff, as well as the requirement to leave post at a moment's notice to retrieve urgent case notes from the library or other area within the hospital.

### **13. KNOWLEDGE, TRAINING AND EXPERIENCE REQUIRED TO DO THE JOB**

#### Essential

- SVQ 3 Administration
- Experience in an administrative role
- Experience of working with the public
- Fast and Accurate in the operation of a keyboard
- Literate & Numerate
- Good Communication Skills
- Ability to work as part of a team, and on own
- Ability to work with the minimum of supervision
- Knowledge and understanding of confidentiality
- Knowledge and understanding of IT systems
- Ability to lift and carry with and without the assistance of mechanical aids

#### Desirable

- E.C.D.L.
- Records Management Competency Framework
- Experience in an NHS Health Records environment.
- Previous experience of working with electronic Health Record Systems
- Knowledge of medical terminology

## 14. STANDARD ELEMENTS

### STANDARD ELEMENTS

#### **Confidentiality**

**Comply with all approved NHSWI Policies and Procedures. Comply with NHSWI Communication Strategy and Media Strategy.**

This involves taking the necessary precautions when transmitting information only disclosing it to those who have the right and need to know it.

All personal health information is held under strict legal and ethical obligations of confidentiality.

NHS staff must follow guidance (NHS Code of Practice on Protecting Patient Confidentiality) before disclosing any patient information. All staff must respect confidentiality of all matters that they may learn relating to their employment, other members of staff, patients and their families.

#### **Health and Safety:**

**Assist in maintaining own and others' health, safety and security.**

This involves:

- a) Complying with Board health and safety policies, procedures and participating in mandatory training.
- b) Maintaining a safe working environment and reporting any issues of concern as appropriate.

NHS Western Isles attaches the greatest importance to the health and safety of its employees. It is the Board policy to do all that is reasonable to prevent personal injury and hazard to health by protecting staff and others including the public from foreseeable hazards compatible with the provision of proper services to patients. The Board expects its entire staff to take reasonable care of their own health and safety and that of others who may be affected by their acts or omissions at work. More detailed information is given in departmental safety policies where appropriate.

**Ensure own actions support equality, diversity and rights.**

This involves:

- a) Acting in ways consistent with the Board's policies and procedures.
- b) Treating those you come into contact with equitably and with respect.
- c) Recognising the need for aids or adaptations.

## 15. JOB DESCRIPTION AGREEMENT

A separate job description will need to be signed off by each jobholder to whom the job description applies.

Job Holder's Signature:

Head of Department Signature:

Date:

Date: 08.09.2025

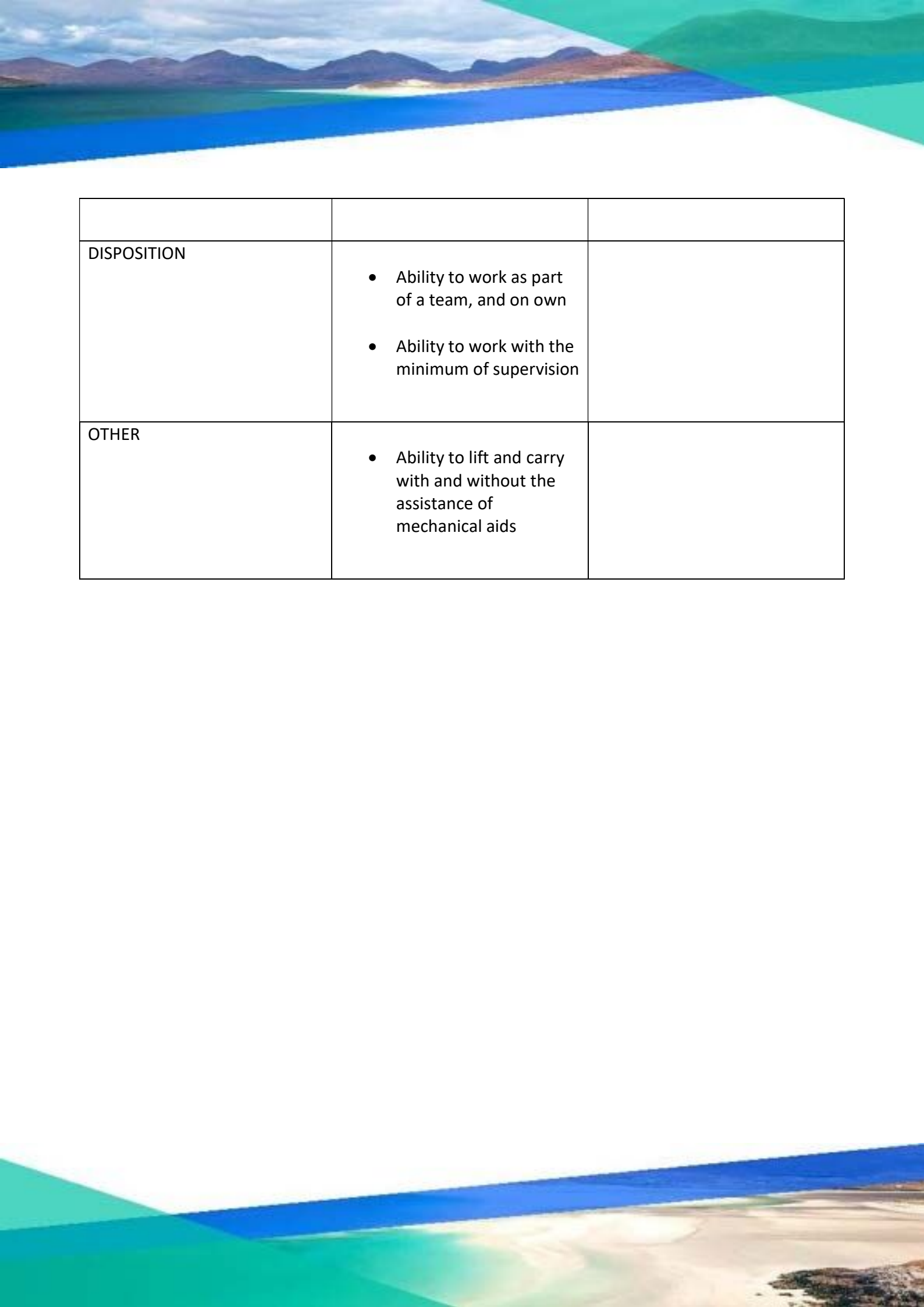
## NHS WESTERN ISLES - PERSON SPECIFICATION GUIDANCE

**Job Title:** Patient Services Officer


**Department:** Patient Services

**Location:** Western Isles Hospital

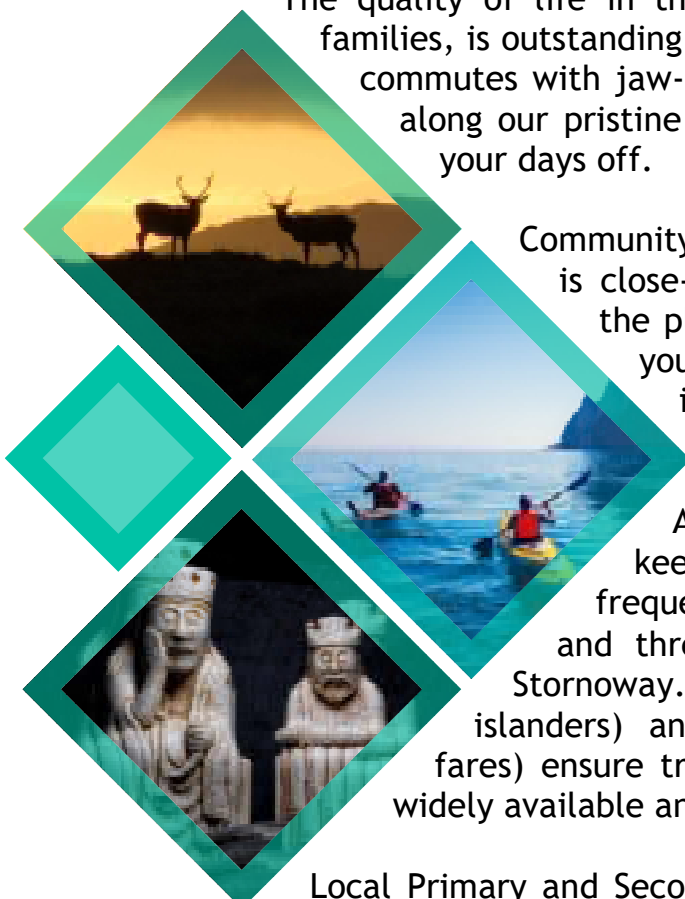
FACTOR	ESSENTIAL	DESIRABLE
EXPERIENCE	<ul style="list-style-type: none"><li>• Experience in an administrative role</li><li>• Experience of working with the public</li><li>•</li></ul>	<ul style="list-style-type: none"><li>• Experience in an NHS Health Records environment.</li><li>• Previous experience of working with electronic Health Record Systems</li></ul>
QUALIFICATIONS TRAINING RESEARCH PUBLICATIONS	<ul style="list-style-type: none"><li>• SVQ 3 Administration</li></ul>	<ul style="list-style-type: none"><li>• E.C.D.L.</li></ul>
KNOWLEDGE AND SKILLS	<ul style="list-style-type: none"><li>• Fast and Accurate in the operation of a keyboard</li><li>• Literate &amp; Numerate</li><li>• Good Communication Skills</li><li>• Knowledge and understanding of confidentiality</li><li>• Knowledge and understanding of IT systems</li></ul>	<ul style="list-style-type: none"><li>• Knowledge of medical terminology</li><li>• Records Management Competency Framework</li></ul>



DISPOSITION	<ul style="list-style-type: none"><li>• Ability to work as part of a team, and on own</li><li>• Ability to work with the minimum of supervision</li></ul>	
OTHER	<ul style="list-style-type: none"><li>• Ability to lift and carry with and without the assistance of mechanical aids</li></ul>	



The quality of life in the Western Isles, particularly for those with families, is outstanding: a safe space to bring up children, stress-free commutes with jaw-dropping views, and the opportunity to stroll along our pristine beaches or explore our dramatic scenery on your days off.



Community spirit is at the heart of the Western Isles. It is close-knit and welcoming, residents are proud of the place where they live and are keen to support young and old. The islands have a strong cultural identity stemming from their distinctive history.

Although the islands are remote, you can still keep connected with the wider world. There are frequent transport links to the mainland via ferries and three island airports – Barra, Benbecula, and Stornoway. The Air Discount Scheme (cheaper flights for islanders) and Road Equivalent Tariff (subsidised ferry fares) ensure transport is affordable. High-speed internet is widely available and allows islanders to stay connected globally.

Local Primary and Secondary Schools provide high quality education with the opportunity to learn through the Gaelic language. There is a network of excellent sport and leisure facilities in the Western Isles with annual cultural festivals and venues with live entertainment.

Key worker housing can be applied for through Hebridean Housing Partnership.

#### Useful Information

[cne-siar.gov.uk](http://cne-siar.gov.uk) Comhairle nan Eilean Siar (Western Isles Council - for more information on Schools, leisure and culture)  
[visitouterhebrides.co.uk](http://visitouterhebrides.co.uk) (for more information on our islands and what to see and do)

## A Place to Work

NHS Western Isles employs over 1000 staff over a number of sites, including:

- Ospadal nan Eilean Siar (Western Isles Hospital), Stornoway
- Ospadal Uibhist agus Bharraigh (Uist and Barra Hospital), Benbecula
- St Brendan's Hospital, Barra
- A number of GP and Dental Practices across the island chain
- A variety of community-based health services

Being part of a smaller team with a flat management structure provides the opportunity to widen your experience and be involved in a range of planning and decision-making that you might not otherwise experience in a larger setting. Our patients are our community, and there is opportunity to contribute to multi-disciplinary and holistic care to patients and families across healthcare settings.

Support and development are central to NHS Western Isles' ethos, and this involves working in partnership with the University of the Highlands and Islands, NHS Education for Scotland, and other higher education institutions. Our Professional Practice and Learning team will support and advise you on your learning journey. Many opportunities can now be accessed remotely through online learning. Regular clinical training is available and scenario-based learning is available in our recently-installed sim lab.

The Western Isles has a range of employment opportunities in the public and private sector for those that are relocating as a family. Please contact us and we can direct you to vacancies that might be suitable.

All staff are valued equally and we welcome and encourage those from diverse backgrounds to come and work for us.



# NHS WESTERN ISLES BENEFITS

## Pay

The NHS pay system is known as Agenda for Change (AfC) which applies to all staff excluding medical, dental and executive level managers.

The benefits include a standard working week of 37 hours, with pay enhancements to reward weekends, nights and overtime working. This ranges from time plus 88% to time plus 30% depending on your pay band and shifts you work.

Distant Islands Allowance is paid to all staff who live in the Western Isles. This is currently £1,406 per year.

## Annual Leave

Annual leave entitlement is 27 working days, rising to 29 working days after 5 years' service and 33 days after 10 years' service. In addition to this, you are entitled to 8 statutory public holidays every year.

## Work-life balance

We understand that balancing work and home commitments can sometimes be difficult.

### Our policies offer:

- Flexible working including home working
- Paid parental leave
- Paid carer leave
- Paid bereavement leave
- Occupational sick pay scheme

## Wellbeing

We recognise that your mental and physical wellbeing is important and we aim to support you in the workplace.

We have a 24-hour confidential helpline to support you and your family through any of life's issues or problems. This includes counselling, family issues, bereavement, financial wellbeing, relationship advice, legal information and more.

## NHS Pension Scheme

All new employees will automatically be enrolled in the NHS Pension Scheme, or if you are an existing member your membership will continue.

### Key features

- Benefits accrued on a Career Average Revalued Earnings (CARE) basis.
- Normal pension age the same as your State Pension Age.
- Pension accrual rate of 1/54th of pensionable earnings each year.
- Valuable death benefits for your dependents.
- Option to take part of your pension and continue working.

Further information on the benefits of the scheme, can be found at [sppa.gov.uk](https://sppa.gov.uk).

## Travel & Transport

We participate in the Cycle to Work scheme, enabling you the opportunity to buy a bike tax-free.

Those who need to travel a lot for work will be eligible for a leased car.

## Right to Work in the United Kingdom

We will support those that are eligible for a certificate of sponsorship to apply for a work visa. Candidates who require a Certificate of Sponsorship can access further information on the UK Border Agency's new points based system that now governs the way individuals from outside the EEA can work in the UK at [bia.homeoffice.gov.uk](https://bia.homeoffice.gov.uk).

