# NHS FORTH VALLEY



# JOB DESCRIPTION

**1. JOB DETAILS**

**Job Title: Health Records Assistant (Team Leader)**

**Reports to: Health Records Supervisor**

**Responsible to: Head of Health Record Services**

**Department: Health Records**

**Job Holder Reference: BN-AC-134**

1. **JOB PURPOSE**

To co-ordinate team members, monitor allocated workload and pro-actively solve non-routine problems on a daily basis.

To provide up-to-date, properly maintained, accurately located and correctly filed health records and related information. To ensure health records are readily available for hospital attendances/admissions and for use by clinicians and health care professionals in support of patient care. To ensure all information held on the Patient Management system is accurate and up-to-date.

To facilitate the patient journey by provision of an outpatient appointment and reception service and to maintain the computerised inpatient/daycase waiting list.

To collect and collate hospital activity statistics.

**3. ORGANISATIONAL POSITION**

**ROLE OF DEPARTMENT – See Appendix One**

**4. DIMENSIONS**

There are 182.44 WTE staff in the Health Record Service. This consists of several teams and covers a wide range of duties:

* Filing Room
* Clinic Preparation
* General Enquiries
* Outpatients
* Admissions
* Appointment Booking
* Legal/Access requests
* Waiting List
* Patient Tracking
* Clinical Coding
* Information
* Primary Care records
* Child Health
* Medical Services administration (Mental Health)
* Mental Health Act administration
* System support
* Ward administration (Mental Health)

**Statistics:**

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| --- | --- |
| **Department Activity** | **Daily statistics** |
| Clinical coding | 220 episodes |
| Clinic preparation | 1140 records |
| General enquiries | 190 enquiries/requests |
| Health record retrieval and filing | 3000 records |
| Access requests | 6 applications |
| Waiting lists | 80 additions (not including amendments) |
| Outpatient system transactions | 8500 transactions |
| New referrals received | 270 referrals processed |
| Patient tracking | 220 transactions |
| Inpatient/daycase admissions | 100 patients |
| Master patient index transactions | 1100 transactions |
| Report/result filing | 720 reports/results etc. |

1. **KEY DUTIES/RESPONSIBILITIES**

* Responsible for co-ordinating team members, monitoring progress of workload and pro-actively solving non routine problems on a daily basis. Keep Supervisors/line Manager up to date on section issues.
* Production and maintenance of health records for all outpatient and inpatient attendances, ensuring that all correspondence and investigation reports, which have been authorised by medical staff are securely filed and that all appropriate documentation is inserted.
* Ensure the security and confidentiality of health information is maintained at all times.

# Accurately process referral letters on the patient administration systems and comply with procedures for new and duplicate registrations.

* Responsible for sending referral letters to consultants for vetting and on their return, recording the vetting decision on the outpatient management system.
* Ensure that the Outpatient Waiting List module is accurate and up to date at all times.
* Responsible for managing the clinic appointments system including making appointments, sending out letters and clinic information, ordering patient transport, changing appointments as directed by consultants and responding to changes requested by patients.
* Provide a welcoming reception service in the outpatient clinics and admissions offices, discretely checking patients details and ensuring that patient administration systems are updated with attendance, outcome and procedures (if appropriate).
* Process subject access requests and other legal requests, and provide case notes and reports for DSS, Procurator Fiscals office and other hospitals.
* Process SMR00’s and correct errors to provide NHS Scotland Information Services Division with national statistics.
* Accurately record each health record location and subsequent movement using the computerised tracking system.
* Effectively deal with telephone enquiries from various sources, for example patients, wards, A&E, GPs and external agencies such as DSS etc.
* Ensuring that all health records are available on request for areas such as wards, clinics and waiting times unit within specified time scales.
* Responsible for accurate filing and safe and secure storage of health records within the records library and other Health Records areas. To annually cull, retain and destroy health records in accordance with local and national guidelines.
* Responsible for retrieval of records from secretaries offices, off-site storage facilities etc.
* Ensure that information gathered by patient management systems is accurate and up to date, to allow effective communication and patient care.
* Maintain the patient-tracking module providing real-time information and ensuring accuracy of hospital activity statistics i.e. ISDS1 reports.
* Comply with Divisional Health and Safety policy to ensure a safe working environment.
* Comply with Data Protection Act, Caldicott and Information Governance standards when using the patient management systems detailed in Section 7.

The above duties and responsibilities are intended to represent current priorities and are not a conclusive list. The jobholder may be asked to undertake other reasonable duties as appropriate to grade. Any changes will be made in discussion with the jobholder.

1. **SYSTEMS AND EQUIPMENT**

**Terminal digit filing system:**

It is a shared responsibility of all staff members to maintain the health records filing system and storage areas, by strictly adhering to the rules applied to terminal digit filing and the retention and destruction guidelines.

**Computerised information systems:**

Computerised systems are used continuously in the Health Records service; the level of use by each staff member varies depending on their current task. However, regardless of the area they will use one or more of the following:

* + Topas
* SCI Store
* SCI Gateway
* SCI DC
* Beatson Oncology Centre clinics
* Renal system
* CHI (Community Health Index) Gatekeeper
* QAS (Quick Address System)
* Clinical e-mail
* Outlook e-mail
* Legal database (Microsoft Access)
* EDMS (Electronic Document Management System)
* RMS (Electronic Referral Management System)

**Equipment:**

Safe and effective use of the following equipment is a shared responsibility of all staff members:

* + Mobile and static shelving units
  + Kick stools and ladders
  + Variety of trolleys, including constant load level trolleys
  + Carry cases and boxes for health records
  + PC workstations, printers and scanners
  + Label printers and report printers
  + Photocopiers
  + Fax machines, including Safe Haven faxes
  + Case record hoist

**7. ASSIGNMENT AND REVIEW OF WORK**

Work is self-directed within agreed procedures set by the Head of Health Record Services, and guidance from the departmental supervisor is available if required.

Judgement is required when dealing with patients and other health care professionals on a daily basis.

Post holders are subject to performance review by the departmental supervisor and formal annual review via the Personal Development Plan, which involves the Health Records Management team.

**8. COMMUNICATIONS AND WORKING RELATIONSHIPS**

Communication via e-mail, telephone, fax, letter and face-to-face contact to manage health related information internally and externally:

Internal: Secretarial staff

Clerical staff

Medical staff

Nursing staff

Porters

External: Patients and their relatives

Scottish Ambulance Service

GP surgeries

Off-site storage providers

Other Operating Divisions and hospitals

**9a. PHYSICAL DEMANDS OF THE JOB**

Post holders are required to retrieve, file and handle records, which can often be bulky and heavy. On average one case note weighs 1.2kg (2.65lbs), with staff lifting up to six case notes at once, for periods of up to two or three hours several times per day. Staff are required to work in confined spaces or awkward positions on a daily basis, dependant on the area or department assigned.

The working environment varies from office accommodation to unpleasant and isolated storage facilities.

Staff can spend periods of up to three hours, several times per day at PC workstations. Keyboard skills and hand/eye co-ordination are required due to high levels of data input requiring speed and accuracy.

**9b. MENTAL/EMOTIONAL DEMANDS OF THE JOB**

Concentration is required throughout the working day for example; data input, filing and retrieval of patient records and appointment booking. Although the work pattern is predictable there are constant interruptions from telephone calls and enquiries from other staff and departments.

There is occasional exposure to verbal aggression, on average once per week.

In some cases there may be a requirement to deal with sensitive issues relating to distressed patients and/or relatives, on average twice per month, for example; imparting news of cancelled appointments or admissions.

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

The post holder must have standard grade English, Arithmetic, Computing qualifications or equivalent work experience of up to five years in an office environment as a minimum.

Two years previous Health Records experience is desirable.

On the job training and assessment in specific systems and procedures is provided. The Personal Development Plan process will enable staff to gain Level 2 qualification in SVQ’s, Basic Level Certificate of Technical Competency from the Institute of Health Records, Data Protection Act Certificate and the European Computer Driving License. A fully trained and qualified member of staff will hold all of these qualifications.

**11. JOB DESCRIPTION AGREEMENT**

**Job Holder’s Signature:**

**Date:**

**Head of Department Signature:**

**Date:**

**APPENDIX ONE**

**ORGANISATIONAL POSITION**

## Head of Health Record Services

**Health Record Services Manager**

**Health Records Supervisor**

**Health Records Assistant (Team Leader)**

**Health Records Assistant**

**ROLE OF DEPARTMENT**

The Health Records Department facilitates both strategic and operational management functions. To enable this, the department must:

* Ensure that the patient medical record is available to the clinician at all times.
* Create and maintain reliable storage and retrieval systems.
* Provide and manage a retention and destruction policy, in keeping with national guidelines supporting legal requirements.
* Manage administration of the patient journey from initial referral to appointment booking, clinic preparation, reception, waiting list and inpatient stay.
* Provide accurate clinical coding following discharge to support the Trust Information systems, which in turn support local clinical and business decision-making and feed the national database.
* Play a strategic role in the move towards an Electronic Patient/Health Record under the National IM&T Strategy, including expert input into the ECCI project and associated systems such as SCI outpatients and the interface to the National UPI (unique patient identifier).
* Provide a professional advisory service on medical records and related matters.
* Ensure appropriate measures are in place to maintain staff awareness of security and confidentiality of patient information under Caldicott Recommendations and the Data Protection Act and be responsible for the management of subject access requests.

**PERSON SPECIFICATION**

# HEALTH RECORDS DEPARTMENT

#### HEALTH RECORDS TEAM LEADER – AFC BAND 3, 37.5 HOURS

|  |  |  |
| --- | --- | --- |
| ATTRIBUTES | ESSENTIAL | DESIRABLE |
| SKILLS/ABILITIES | * Ability to prioritise own and others workload * Ability to work to set deadlines * Excellent telephone manner * Numeracy * Keyboard skills * Ability to concentrate for frequent long periods * Ability to cope with frequent interruptions * Ability to deal with change * Ability to resolve non routine problems on a daily basis | * General office skills |
| EXPERIENCE | * MS Office Suite or similar software package | * Two years Health Records experience |
| INTER-PERSONAL | * Must be able to assist with the day to day management of staff * Should be able to work as part of a team * Required to deal with staff from various disciplines/ specialties |  |
| EDUCATION | * Standard Grade English and Maths | * IHRIM Certificate of Technical Competence * ECDL |
| OTHER | * Must be able to observe all aspects of confidentiality within and out with the Department * A willingness to participate in Department/Organisational initiatives * Must be able to cope with a sometimes physically demanding job * Enthusiasm * Organised approach | * Awareness of the Data Protection Act 1998 |