**  
Job Description SC06-1651**

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| **1. JOB IDENTIFICATION** | Job Title | Team Leader |
|  | Department(s)/Location | Health Records Department, Ninewells Hospital |
|  | Number of job holders | 7 |
| **2. JOB PURPOSE**  To manage a team-structured department which provides a 24-hour efficient records service to support the delivery of clinical care and provide on-the-job training to staff within each team. | | |
| **3. ORGANISATIONAL POSITION**  Head of Health Records  Health Records Manager  Assistant Records Managers  Team Leaders, Health Records Department  Clerical Officers | | |
| **4. SCOPE AND RANGE**  The Health Records Department at Ninewells Hospital is responsible for the provision of key services supporting patient care and management, e.g.:-  - providing a comprehensive health records library service,  - providing case records, with all supporting information, for in-patient/day case admissions and out-patient attendance at Ninewells Hospital,  - providing case records on request, with all supporting information, for in-patient/day case admissions and out-patient attendances at other Dundee, Angus, Fife and Perth hospitals,  - processing requests for case records from other hospitals in the UK and on occasion from abroad,  - processing all referral letters and appointments for new patients at consultant clinics,  - coding and collating in-patient/day case/out-patient data for submission to Information and Statistics Division for utilisation by management both locally and nationally for the monitoring of performance/guarantees/targets and to assist with future health care provision planning,  - dealing with subject access requests in accordance with the provisions of the Data Protection Act/Access to Health Records Act/Freedom of Information Act,  - dealing with court orders and information requests from courts/procurators fiscal/police/solicitors/insurance companies/Criminal Injuries Compensation Authority/RTA Compensation Unit, etc.  The catchment area served is predominantly Tayside and Fife with a population of approximately 450,000 but in reality patients can present at hospital from anywhere in the UK and often from abroad.  Supervision of staff on a day-to-day basis, workload allocation/prioritisation and dealing with HR issues including recruitment, appraisals, discipline and back to work interviews.  The post-holders have shared responsibility for stock ordering, checking clock cards/time sheets and reporting overtime hours.    New out-patient referrals 60,000 pa  In-patient admissions 55,000 pa  Day cases 18,000 pa  Out-patients 255,000 pa  Day patients 26,000 pa  Staff Numbers: 74 posts | | |
| **5. MAIN DUTIES/RESPONSIBILITIES**  Supervisory:-  - organising and managing staff workload on a daily basis,  - organising staff rotas and holidays,  - attending Health Records supervisory meetings and holding regular team meetings to ensure staff know new policies and any health and safety matters relating to the department,  - return-to-work interviews after sick leave,  - interviewing and recruiting new staff, training them in all aspects of team area,  - look after other team areas during sickness and holidays of other Team Leaders,  - ensure that a member of staff requiring disciplinary correction of behaviour is monitored and reported to line manager,  - organise pre-sort, overflow and deceased filing areas,  - oversee outgoing deliveries,  - make decisions on storage of case records,  - compile statistics for submission to manager on a monthly basis,  - running off clinics and late additions from i-Fit/TrakCare,  - calculating and administering staff flexi-time,  - participate in the investigation of complaints,  - provide training in medical records duties/procedures to other NHS staff.    Also, on a rotational basis, carry out list of rotational duties, as mentioned in the following:-  **REFERRAL LETTERS:**  - check and confirm patient referral letters and attachments in Electronic Referral Service system,  - update Master Patient Index [MPI] In-Patient Administration System [PAS] and TrakCare [out patient system],  - print supply of patient labels,  - retrieve case records from library in order to merge letter and add appropriate documentation – ensuring tracer system is appropriately updated,  - check destroyed lists/secondary libraries before creating new folders,  - locate and retrieve case records from departments/other hospitals/secondary libraries,  - use knowledge of hospital layout/personnel/PAS/procedures to locate case records difficult to find,  - re-file case records.  **LATE ADDITIONS/EMERGENCY OUT PATIENTS/NOTES REQUIRED BY OTHER HOSPITALS/GENERAL ENQUIRIES:**  - retrieve case records from library - ensuring i-Fit tracking system is appropriately updated - in order to merge letters and add appropriate documentation,  - update MPI/PAS/TrakCare and print supply of patient labels,  - check destroyed lists/secondary libraries,  - deliver notes to clinic areas/send in secure boxes to other hospitals,  - locate and retrieve case records from departments/other hospitals/secondary libraries  - use knowledge of hospital layout/personnel/PAS/procedures to locate case records difficult to find,  - provide an enquiry/reception service for telephone callers and visitors to the library,  - pre sort case records returned from wards/departments,  - record destination of case records sent on to other wards/departments/hospitals,  - re-file case records in library.  **CLINIC PULLING:**  - extract case records from the library from numerical ordered list,  - update tracer system with appropriate information for relevant clinic/date,  - check all case records have sufficient labels - print new labels as necessary,  - replace torn folders with new folders as required,  - arrange tied bundles of case records in same order as clinic list for delivery to clinic areas,  - re-file case records in library.  **QUERIES:**  - locate and request case records from wards/departments/other hospitals/secondary libraries listed on clinic sheets,  - use knowledge of hospital layout/personnel/PAS/procedures to track down case records,  - carry out more detailed searches for case records difficult to find,  - deliver case records to clinic areas,  - re-file case records in library.    **ADMISSIONS [WAITING LIST]:**  - retrieve case records from library - ensuring i-Fit tracking system is appropriately updated - from lists of expected admissions and add appropriate documentation,  - update patient details in PAS,  - check all case records have sufficient labels - print new labels as necessary,  - replace torn folders with new folders as required,  - use knowledge of hospital layout/personnel/PAS/procedures to locate case records and carry out more detailed searches for those records difficult to find,  - re-file case records in library.  **ADMISSIONS [EMERGENCIES]:**  - update existing patient details within PAS, register new patients and admit all patients to system,  - record all emergency admissions in register,  - retrieve case records from library - ensuring tracer system is appropriately updated,  - check secondary library and destroyed lists before creating new folders,  - ensure all appropriate documentation is compiled in case records with an adequate supply of patient labels,  - deliver case records to appropriate ward/department,  - use knowledge of hospital layout/personnel/PAS/procedures to locate case records and carry out more detailed searches for case records difficult to find,  - check with various wards/departments at regular intervals for admissions not previously notified,  - re-file case records in library.  **CULLING/WEEDING:**  - remove case records from shelf,  - check case records for last recorded entry,  - re-locate relevant case records to secondary library,  - locate larger volumes of case records to predetermined shelving,  - identify the majority of case notes for destruction,  - enter details of notes destroyed on i-Fit tracking system,  - merge duplicate folders,  - tidy case records/tracer cards and re-locate records within filing bays when necessary.  - record change of tracer entries sent to the department.  - update case records when a change of gender/date of birth is notified to the department.  - removed from the current/secondary libraries the case records of patients who are deceased, mark the records accordingly and re-file the records in the deceased filing area.  **Induction Standards & Code of Conduct**  Your performance must comply with the national “Mandatory Induction Standards for Healthcare Support Workers 2009” and with the Code of Conduct for Healthcare Support Workers. | | |
| **6. COMMUNICATION AND RELATIONSHIPS**  Explaining the reason for missing case records to the relevant parties concerned.  Communicating with patients for various reasons including interviewing overseas visitors.  Attend various steering group meetings, i.e., Team Leaders’ weekly meeting and daily huddles, Partnership Forum, Health and Safety groups and others as appropriate.  Effective leadership, good communication and maintaining satisfactory working relationships with all medical records staff.  Regular telephone/face-to-face contact with other hospital records staff, medical/nursing staff, AHP staff, medical secretaries/ward clerical staff, receptionists, patients, general public, police, solicitors and GP practice staff in order to fulfil duties - requiring good all-round communication skills to obtain co-operation.  The post-holder is also required to:-  - resolve situations when staff conflict occurs,  - communicate with staff who have a different agenda,  - exercise tact and diplomacy when requesting information from a range of staff to fulfil duties,  - overcome communication barriers with people where English is not their first language or where people have a mental/physical disability. | | |
| **7. KNOWLEDGE, TRAINING AND EXPERIENCE REQUIRED TO DO THE JOB**  Be able to read correspondence, medical terminology, layout of case records, TrakCare, local and national hospital contact and SMR admissions/discharge codes.  Instructing medical staff how to use Records Library correctly.  Update our moving and handling skills annually to maintain a safe working environment.  Conduct tours to give a brief insight into the Health Records Department function (internal staff and external visitors).  Maintaining destroyed records on i-Fit and giving guidance to staff and visitors.  Detailed knowledge of health records policies/procedures and computer systems gained through training/experience.  Understand and maintain total confidentiality in all work commitments.  Undergo fire safety training.  Knowledge of the operational policies of other departments/hospitals.  Relevant qualifications at HNC/HND Level or equivalent or advanced level of certificate of technical competence (IHRIM) or ECDL or equivalent.  Possess management/supervisory skills e.g. leadership of junior staff and also HR skills including recruitment, appraisal, discipline, attendance at work etc.  Previous experience within a medical records environment and /or NHS supervisory experience. | | |

ESSENTIAL ADDITIONAL INFORMATION

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| **8. SYSTEMS AND EQUIPMENT**  Microsoft Excel  Medicine Net  Ricoh Document Scanner and E-repository System  ICD-10 Code books  TrakCare – extensive use of system  ERS [electronic referral service]  CHI-24  NHS Tayside intranet/internet  E-mail  i-Fit  Near Me  Responsibility for ordering stationery and other stock.  Sole responsibility for reporting faults and recommending to senior manager the replacement of equipment.  Daily use of telephones, fax machine, photocopier, printers, scanners and other new technology as necessary.  **Responsibility for Records Management**  All records created in the course of the business of NHS Tayside are corporate records and are public records under the terms of the Public Records (Scotland) Act 2011. This includes email messages and other electronic records. It is your responsibility to ensure that you keep appropriate records of your work in NHS Tayside and manage those records in keeping with the NHS Tayside Records Management Policy and with any guidance produced by NHS Tayside specific to your employment. |
| **9. PHYSICAL DEMANDS OF THE JOB**  Physical skills:-  - keyboard skills used virtually continuously,  - to be able to deal with constant interruptions causing a change in duty being carried out e.g. bleep holder, emergency request for case records.  Physical effort:-  - to handle, file and retrieve case records from libraries in confined spaces where bending, lifting and stretching to locate sometimes heavy case records can cause physical difficulty and discomfort e.g. pulling from lists,  - to fill, lift and empty boxes of case records,  - to manoeuvre trolleys over long distances and via lifts,  - to walk for long periods-up/down stairs etc whilst locating case records,  - to climb up and down ladders.  Mental effort:-  - to concentrate inputting patient data into computer systems,  - to work to meet deadlines e.g. proving notes for set patient appointments/admissions/emergencies,  - direct exposure to medical records which contain distressing and sensitive information about patients,  - prepare and deliver ongoing on-the-job training to health records staff and training in health records procedures to other NHS staff,  - deal with situations involving staff conflict, discipline, grievance resolving and staff problems [counselling].  Working conditions:-  - to work in dusty conditions [direct exposure to dust/dust mite] and windowless environment,  - indirect exposure to bodily fluids, chemicals and infection when in wards and departments,  - exposure to verbal aggression/hostility [on average once per week].  Some examples of physical effort [please note that staff rotate duties and these values are typical when carrying out this particular task]:-  - staff process up to 130 requests per shift while sitting constantly at a P.C.,  - staff pull 1000 notes from the library per shift which amounts to a combined total in weight of approximately 210 stone (1,334 kg),  - staff push fully laden trolleys that require 55lbs (22kg) of force to start/stop and 22lbs (10kg) of force to keep in constant motion,  - staff locating notes in the hospital can walk up to 8-9 miles per shift. |
| **10. DECISIONS AND JUDGEMENTS**  The post-holder will:-  -make departmental decisions in line manager’s absence,  -be responsible for carrying out searches for case notes and make final judgement on whether to raise case records in line with current legislation after all other avenues have been explored,  - provide input and feedback to departmental managers regarding new and improved working practices,  -ensure that any member of staff who is capable of career development is encouraged to pursue an opportunity, e.g., further training, courses, etc.,  - participate in staff appraisal meetings, contribute to the setting of objectives for staff supervised and carry out actual appraisal,  -delegate workload to staff supervised in a fair and consistent manner to meet the demands of the service,  - deal with situations involving staff conflict, discipline, grievance resolving and staff problems [counselling]. |
| **11. MOST CHALLENGING/DIFFICULT PARTS OF THE JOB**  To maintain a high supervisory role whilst also carrying out day-to-day duties within team structure.  To be able to interact with and work alongside a large number of staff to ensure an efficient records service.  Dealing with distressed and verbally aggressive patients and staff.  Very mentally demanding due to constant interruptions, working to tight time scales with sometimes very limited amount of staff whilst expected to maintain the same high standard of service.  Very physical, e.g., moving heavy loads of case records, pushing heavy trolleys, walking long distances, working at a P.C. for long periods.  Responsible for achieving daily/emergency retrieval of case records. |
| **12. JOB DESCRIPTION AGREEMENT**  The job description will need to be signed off using the attached sheet by each post-holder to whom the job description applies.   |  |  | | --- | --- | | **Job Holder’s Signature:** | **Date:** | | **Head of Department’s Signature:** | **Date:** | |