

JOB DESCRIPTION

1. Job Details

Job Title	Medical Records Clerk
	Patient Services, Medical Records
Job grade	Band 2
Reports to	Supervisor/Team Leader
Division	CSTO
Department/Area	Medical Records Department
Location	KMH

2. Job Purpose

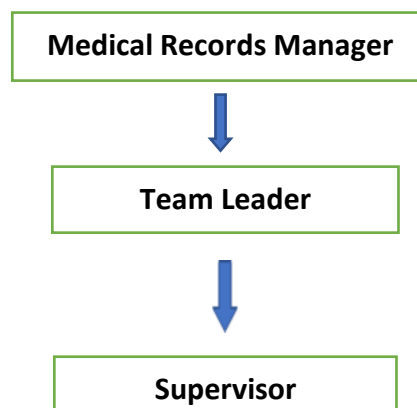
The overriding purpose is to support the provision of the highest quality patient care through personal actions and continuous improvement.

To provide a high-quality service to patients attending the hospital, by ensuring location, appropriate preparation and tracking of case notes for admissions and clinics to help ensure a smooth patient pathway.

3. Role of the Department

- 3.1 To maintain a high standard of quality in providing a patient administration service to support patients, professionals and the Trust.
- 3.2 To produce high quality patient information for the Trust, to enable maximum use of resources and to support the monitoring and planning of future services.

4. Organisation Chart



5. Key Result Area

Case Note File Duties

- 5.1 Maintain the case note library in good order in accordance with departmental policies and procedures for filing, taking account of retention periods and requirements for destruction.
- 5.2 Print clinic pulling lists from the computer system in order to identify notes required for impending clinics.
- 5.3 Accurately pull, track and provide case notes for outpatient clinics on-a-daily basis. Similarly, to sort, track and re-file case notes being returned to file, thus ensuring easy retrieval, distribution and provision of notes to support ongoing patient care. Occasionally this may also involve copying and scanning of records to be provided to other hospitals.
- 5.4 Ensure case notes are collected from outpatients, medical secretaries and the wards on-a-daily basis and appropriately tracked and sorted ready for filing.
- 5.5 Ensure that case notes and associated documents are properly maintained in a complete, orderly and accurate state, thus ensuring their suitability for use, by medical and nursing staff at all times.
- 5.6 Request case notes from the Kings Mill Hospital, and other sites as required, for impending outpatient clinics, thus ensuring notes are available for use by clinician at their outpatient clinics. Similarly, to deal with requests from other sites for case notes held in Newark file.
- 5.7 Responsible for completeness of all clinic case notes, ensuring prompt filing of correspondence and investigation results when case notes are in your possession, to support continuing patient care and thus avoiding clinical risk.
- 5.8 The prompt tracking in and out of case notes using the computer system to maintain accuracy and completeness of all electronic records in accordance with IG and CQC requirements.
- 5.9 Regular use of E-Referral system for accessing referral letters and attachments. If unavailable there will be requirement to liaise with appropriate GP practice, to ensure all referrals are available for the patient's attendance.
- 5.10 To sort incoming mail for the department, including case notes and subsequently to track, file, provide for clinic appointments and deal with any requests for Newark notes, thus contributing to ongoing patient care.
- 5.11 To update details of deceased patients on the computer system, locate associated case notes in file and ensure tracked and sent to deceased file.
- 5.12 Ensure delivery of case notes to all outpatient's areas for the following days clinic appointments, thus ensuring continuity for services for patients and clinicians.
- 5.13 To have a knowledge and understanding of the Trust's retention and destruction policy and to contribute to the weeding of files for destruction, thus maintaining maximum amount of space in file.

Clinic Prep Duties

- 5.14 Make appropriate preparations for all clinics, to ensure that the patient's visit will run smoothly. For each clinic session this will involve ensuring that the following are available for use by clinicians:
- Appropriately prepared case notes
 - Clinic attendance sheets
 - Locating missing notes from departments around the trust
- 5.15 Ensure that Case Notes and associated documents are properly maintained in a complete, orderly and accurate state, thus ensuring their suitability for use by medical and nursing staff, at all times.
- 5.16 In accordance with the Trust's commitment to move to a single set of case notes across all sites, ensure the following:
- Identify whether the patient has previous notes, if not ensure that a Sherwood Forest Hospitals (SFH) set is made up.
 - If the patient has only Newark notes these must be converted to a SFH set and again notes as such on the computer system.
- 5.17 Referral letters for patients attending for the first time will be filed accurately by name of consultant to be seen and by date of referral, thus ensuring availability of letters for clinic preparation.
- 5.18 Once notes are located and appropriately merged/converted, etc they will be prepared for clinics in accordance with the standard operating procedure as follows:
- Locate the referral letter from the appropriate file, from choose and book, or via the appointment officer in the case of target referrals.
 - Ensure sufficient history sheets are available for the Doctor to write on and date the page ready for clinic attendance.
 - Provide up to date front sheet and sufficient ID labels.
 - Provide reconciliation slip.
 - Check all notes present and place in order of expected attendance.
 - Make ready for transport to clinic reception area.
 - Change addresses on the computer system as appropriate.
- 5.19 To deal with telephone enquiries from patients, relatives, clinicians and other members of Trust staff in relation to outpatient appointments and clinics. There is an expectation that staff will use their initiative in dealing with such enquiries although support and advice is readily available from Departmental Supervisor.

Admissions Duties

- 5.20 Ensure any case notes required by the wards following emergency admissions are located, appropriately prepared, tracked and provided in a timely manner. Similarly, it may involve requesting case notes from other hospitals.

Other duties

- 5.22 Maintain good relationships with patients and other members of staff, ensuring a high degree of confidentiality and integrity, at all times. Similarly, to ensure that patients are dealt with an equitable way, taking account of their diversity and rights.
- 5.23 Be an active member with joint responsibilities for providing a high-quality patient administration service, working flexibly within the department to ensure continuity of service and to attending meeting and communication cells as required.
- 5.24 Be aware of the local and national standards affecting patient services and contribute to their achievement, thus aiding the attainment of the Trust's goals.
- 5.25 To maintain accuracy and completeness of all electronic records and to follow policies and procedures for the recording of data on the computer system and to accurately track records on the case note tracking system, thus contributing to the Trust's commitment to sound data quality.
- 5.26 To ensure responsibility for personal development and keeping up to date with appropriate changes and developments affecting the service, thus ensuring ability to carry out the role as appropriate. Similarly, to offer views and suggestions in relation to service and procedure changes, particularly in relation to NHS modernisation.
- 5.27 All staff employed by the Trust are required to work in a safe manner, in accordance with current health and safety legislation and with the general principles laid down in the Trust's Health and Safety Policy.
- 5.28 You are required to comply with all the Trust's policies and procedures. These are obtainable on the Trust's intranet site, where guidance is also contained.
- 5.29 Equality and Diversity is fundamental to all the hospital does, both in the way we provide services to our community, patients and the way in which we manage our staff. All staff employees are required to respect and adhere to the principles of equality and diversity treating patients and staff with dignity and respect as laid down in the Trust's Single Equality Scheme.
- 5.30 All employees have an individual responsibility to ensure that all information recorded both manually and electronically achieves and maintains the highest possible data quality standards by adhering to the Trust's Data Quality Strategy and Policy. Poor quality information will put patient care and safety at risk and will also impact the Trust's performance and finances.
- 5.31 All employees have an individual responsibility to have knowledge of and employ the basic principles of infection control practice and to ensure adherence to the requirement in the Infection Control Manual.
- 5.32 To undertake any other duties which may be reasonably regarded as within the nature of the duties, responsibilities and grade of the post as defined, subject to the proviso that appropriate training is given and that wherever possible significant changes of a permanent nature shall be mutually agreed and incorporated into the job description in specific terms and the post re-evaluated if the change is likely to result in a job evaluation score change.

6. Physical and Mental Skills

- 6.1 Good clerical and accurate keyboard skills.
- 6.2 Organises, prioritises and manages on time with agreed guidelines and timescales, ensuring that appropriate deadlines are met.
- 6.1 Maintains effective working relationships and communicates well with colleague's, clinicians, managers and patients.

7. Responsibilities of the Post Holder

- 7.1 Ensures that patients are dealt with in an equitable manner and account will be taken of diversity.
- 7.2 Follows policies and procedures set out within the role, offering suggestions to improve systems as appropriate.
- 7.3 May be required to explain and demonstrate departmental procedures to less experienced colleagues.
- 7.4 Responsible for accuracy of data collection as part of day-to-day practices.
- 7.5 With other departmental colleagues, to take reasonable care of equipment and resources used in day-to-day work, e.g., furniture, fittings, case notes, X Ray films and computer equipment.

8. Freedom to Act

- 8.1 Works with close supervision and within clear practices and procedures but expected to use initiative when dealing with enquiries.
- 8.2 The post holder will maintain strict adherence to department and Trust policies, in particular those relating to confidentiality, data protection, Police procedure and bogus callers.
- 8.3 To follow policies and procedures for the recording of data on the computer system.

9. Physical, Mental and Emotional Effort Required

- 9.1 On a daily basis required to sit for periods of time at a computer. This will be for a considerable part of the shift.
- 9.2 Requirement to deal with large numbers of case notes which are often store on high shelving. Steps and trolleys are provided to assist with this and there is a requirement to stretch and climb. Regularly moving case notes which weigh over 15 kilos and may involve the lifting of green boxes of case notes.
- 9.3 General mental alertness is required when dealing with patient information and the requirement to collect accurate associated data.
- 9.4 Physical requirement when using mobile racking, ladders and pushing loaded trolleys, e.g., bending, stretching and ensuring the safety of others and self.

10. Outline of Working Conditions

- 10.1 Mainly works in office or case note store environment. Some case notes are stored in external stores requiring staff to go outside regardless of weather conditions several times per day,

Sherwood Forest Hospital NHS Trust

Person Specification

Post of Medical Records Clerk , Medical Records

Attribute	Essential	Weighting	Desirable	Weighting	How identified
Knowledge Requirements	Computer literate, with experience of using a keyboard		Knowledge of Medway and NHS in general		Application/Interview
Qualifications – Academic/Craft/ Professional	Good general education with GCSE English at Grade C or above				Application/Interview
Further Training			Knowledge and use of Medway		Application/Interview
Experience	Good communication skills Good Organisation Skills Ability to work to strict deadlines Ability to work in a confidential setting Evidence of teamwork		Previous clerical and customer care experience		Application/Interview
Contractual Requirements	Good attendance record, punctual				Application/Interview

	Flexible attitude to cover sickness and annual leave				
	Continual professional awareness				
	Adherence to Trust & department policies and procedures				

Job Description Agreement

Job Holder’s Signature Date

Line Manager’s Signature Date

