

## Job Description

1. Job Details	
<b>Job title:</b>	Health Records Clerk
<b>Current Job grade:</b>	Band 2
<b>Reports to (Title):</b>	Team Leader / Health Records Manager
<b>CMT:</b>	Clinical Support Services
<b>Department/Ward:</b>	Health Records
<b>Location/Site:</b>	Pilgrim Hospital, Sibsey Road, Boston, Lincolnshire, PE21 9QS

2. Job Purpose
<p>To ensure patients notes are received for appointments in line with booking requirements of the Trust.</p> <p>To ensure patients receive all relevant information in a timely, accurate and effective way.</p> <p>To ensure all data relating to patients is captured in a timely and accurate manner.</p> <p>Prepare patient casenotes in accordance with STAG guidelines.</p> <p>To provide a customer focused professional service.</p> <p>To provide services, to relevant areas in a professional, understanding and courteous manner.</p> <p>To provide an efficient, professional and proactive Health Records library and Inpatient/ Outpatient function across the Trust in accordance with the Access Policy.</p> <p>Provide an information service to the general public and wards</p>

3. Organisation Chart
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Access Booking & Choice Manager  
(Pan Trust)

Health Records Manager – Health Records Dept  
(Pilgrim)

Team Leaders

Health Records Clerk  
(This Post)

#### 4. Duties

1. To contact patients by relevant means, gaining agreement of acceptance of booking with patient or their representative.  
  
To receive telephone calls from patients or their representative and within agreed protocols to give information relevant to the appointment and if required to take appropriate action.  
  
To make/receive telephone calls/ email and/or facsimiles and to take appropriate action.  
  
To receive and action appropriately all incoming mail to the department.  
  
Accurately update and validate case note tracking system.  
  
To undertake photocopying of forms, booklets and any other relevant information required to undertake duties  
  
To take appropriate action if office equipment fails
2. To prioritise workload to ensure patients receive the required notice of booking in chronological order whilst ensuring maximum utilisation of available resource.  
  
Ensure appropriate patients are appointed by following agreed procedures, clinician's directives and booking rules.  
  
Ensure the security of health records department, surrounding area and any area's accessed during shift, following set procedure.
3. To maintain the Patient Administration System as required ensuring accuracy and timely data quality in accordance with Trust protocols.  
  
To update patient information using NSTS/CSA  
  
To maintain filing systems  
  
To participate in Major Incidents as requested

To generate prints when required

4. Liaising with clinicians, management, clerical and secretarial staff, wards, departments, GP surgeries and other relevant healthcare organisations. (e.g. ambulance service) both internally and externally for the retrieval and dispatching of case notes
5. To prepare and deliver case notes to both clinic and patient reception areas.  
  
To resolve where appropriate, problems arising in clinic in relation to patient notes, to liaise where necessary with clinical staff & refer to team leader where resolution is not possible.
6. To locate, retrieve and prepare all relevant patient notes and referrals.  
  
Reading patient information to ensure all relevant patient notes are present at the time of the clinic appointment.
7. Reconcile Temporary Notes with originals / merge multiple health records into Trust folder and volumise bulky health records.  
  
File health records and reports from other hospitals into main library and cull health Records for dispatch to storage facility.  
  
Pull audits and locate missing notes.
8. Following mandatory training, meet the training requirements of new staff to include all aspects of duties required to undertake the post.  
  
To support, correct and monitor new starters, identifying further training requirements to the supervisors, meeting the changing demands and needs of the service
9. To provide cover for absent colleagues to ensure the needs of the service are met.  
  
To undertake any other appropriate duties as requested by Team Leader/Assistant Choice & Access Manager.
10. To ensure confidentiality in line with the Data Protection Act 1984/98 and the Trust's ICT security policy of information, obtained during the course of employment, on all matters relating to patients, staff & the Trust's business

## 5. Physical and Mental Skills

### Experience:-

Working in a customer focused environment.  
Working in a busy environment  
Working to tight deadlines  
Experience as working as part of a team

### Skills:-

Ability to input data in a timely and accurate manner

Ability to prioritise own workload  
To work on own initiative within agreed protocols  
Good verbal communication skills  
Good customer care skills  
Basic knowledge of medical terminology  
Ability to handle multiple tasks simultaneously

**Behaviour:-**

Good inter-personnel, organisational and communication skills  
Flexibility, adaptability and the ability to deal with change, to be able to cover a broad range of work, sometimes complex and non-routine.

## **6. Responsibilities of the Post Holder**

To ensure confidentiality in line with National and Trust specific policies.

To ensure the smooth and efficient running of the Health Records Systems in the Trust with particular emphasis on patient care.

Prioritise own workload.

Demonstrate duties to new and existing staff and participate in the induction of new staff.

Personal duty of care in relation to health and safety within their working area.

Access secure / isolated areas.

United Lincolnshire Hospitals Trust is committed to safeguarding and promoting the welfare of children, young people and adults, both as service users and visitors to Trust premises. All staff have a responsibility to safeguard and promote the welfare of children and adults. The post holder, in conjunction with their line manager, will be responsible for ensuring they undertake the appropriate level of training relevant to their individual role and responsibilities and that they are aware of and work within the safeguarding policies of the Trust.

The post holder is expected to treat patients, service users and carers with courtesy, care and compassion at all times, treating each person as an individual by offering a personalised service. Trust staff will adopt behaviours and attitudes, which promote, supports and respects privacy and dignity in accordance with the Trust Dignity policies and dignity in care pledges. Staff are expected to challenge poor practice in relation to dignity and treat each other with respect.

United Lincolnshire Hospitals Trust is committed to providing consistently excellent and safe patient-centred care for the people of Lincolnshire, through highly skilled, committed and compassionate staff working together. We do this by putting our patients at the centre of all that we do and providing the best quality care with passion and pride. We have a set of values that inform every action we take and every decision we make. They are the foundation of what United Lincolnshire Hospitals NHS Trust stands for, and encompass a desire in all of us to provide the highest quality of care to patients and each other.

All staff are required to advocate, champion and demonstrate the below values and behaviours

<b>Patient centred</b>	I am fully committed to providing the very highest standards of care to our patients
<b>Safety</b>	I do everything I can to keep my patients and my colleagues safe
	I keep my environment clean and tidy
	I recognise when something is going wrong and I have the courage to do something about it
<b>Compassion</b>	I show a genuine concern for my patients and my colleagues
	I communicate well with others, listening and showing an interest in what they have to say
	I am positive, approachable and friendly
<b>Respect</b>	I treat my patients and my colleagues with dignity and respect
	I work openly and honestly as part of an effective team
	I keep my promises and do what I say I will, when I said I will, or I will provide an explanation if I can't
<b>Excellence</b>	I will always go the extra mile and improve things for my patients and my colleagues
	I am competent to carry out my role and committed to my personal and professional development
	I will share good ideas and best practice and encourage my team members to do so too

## 7. Freedom to Act

The role requires an ability to prioritise own workload, whilst working as part of a larger team under supervision.

## 8. Physical, Mental and Emotional Effort Required

The role requires the post holder to exert frequent light physical effort for short periods.

The role requires the post holder to exert moderate physical effort for short periods when lifting Health Records, pushing trolleys of notes or moving small amounts of stationery.

The nature of the role requires the post holder to be able to work to tight deadlines and to prioritise own workload.

The role requires the post holder to spend regular periods of concentrating.

The role requires the post holder to work in a very busy environment with frequent interruptions both in a face to face capacity and via the telephone.

The role will require occasional exposure to clients who may be emotional, or verbally aggressive by telephone or in a face to face environment.

## 9. Outline of Working Conditions

The post does require the use of VDU equipment for extended periods of time and occasional use

of a photocopies.

Frequent noise from telephones and computer equipment.

## Person Specification

### Post of Clerical Officer

Job Related Criteria	Essential	How Identified	Desirable	How Identified
<b>Qualifications</b> (Academic, Professional & Vocational)	<p>Good standard of education with at least 5 GCSE's (grade C or above) or equivalent, including English and Maths</p> <p>Or an NVQ2 or equivalent in relative subject, i.e. Customer Care Skills</p> <p>Computer literate with working knowledge of Microsoft Excel and Word</p>	Application Form, Certificates Interview & Test	<p>CLAIT or European Computer Driving Licence.</p> <p>Basic knowledge of Medical Terminology.</p>	Application Form, Certificates Interview & Test
<b>Previous Experience</b> (Nature & Level)	<p>Experience of working with the general public in a customer facing capacity</p> <p>Experience of working in an office environment.</p>	Application Form & interview	Knowledge or experience of NHS working.	Application Form & Interview
<b>Evidence of Particular:</b> - <b>Knowledge</b> - <b>Skills</b> - <b>Attitudes</b>	<p>Excellent customer care skills.</p> <p>Excellent time management skills, the ability to adhere to strict deadlines.</p>	Application Form and Interview	Knowledge and experience of using PAS and other patient/hospital related computerised systems.	Application Form & Interview

	<p>Good communication skills, both written and verbal.</p> <p>Ability to plan and prioritise own workload and work on own initiative with variable and unpredictable demands.</p> <p>Ability to jointly plan work with other members of the team</p> <p>Good organisation skills with the ability to work to a consistently high standard both individually and as part of a team.</p> <p>Ability to deal effectively with difficult situations.</p> <p>Ability to work unsupervised and take responsibility for own actions.</p> <p>Awareness and Knowledge of the dignity in care agenda</p> <p>Awareness and Knowledge of the dignity in care agenda.</p> <p>Ability to evidence/demonstrate key values and behaviours in line with the Trust framework:</p> <ul style="list-style-type: none"> <li>➤ Patient Centred</li> <li>➤ Safety</li> <li>➤ Compassion</li> <li>➤ Respect and</li> <li>➤ Excellence</li> </ul>			
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<b>Specific Requirements</b>	<p>Ability to maintain confidentiality</p> <p>Ability to work flexibly and in a changing environment</p> <p>Ability to work independently as well as in a team</p> <p>Ability to work within tight timescales and prioritise</p> <p>Evidence of ability to pay close attention to detail</p>	<p>Application Form, Interview &amp; Test</p>		
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**Job Description Agreement**

I declare that I have read the Job Description and Person Specification and confirm that this is an accurate and fair description of the role.

**Signature**

**Date**

**Job Holder:**

**Line Manager:**