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LEEDS COMMUNITY HEALTHCARE NHS TRUST

# Detailed Job Description

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| **Post Details**  **Post title:** Medical Records Support Officer  **Band:** Band 5 (Health Records Management Support Officer)  **Profession:** Administration Services/Clinical Systems Administration  **Professional Group:** Business Administration/Corporate |

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| **Service Description:**   * The role requires specialist knowledge and expertise in the management of patient health records during NHS number changes, which is beyond the scope of a generic administrative role. * The post holder is expected to exercise a high degree of autonomy and decision-making within their area of responsibility, including developing processes, providing expert advice, and managing complex stakeholder relationships. * The leadership, communication, and partnership working elements of the role, as well as the requirement to undertake analysis and quality improvement activities, are commensurate with the Band 5 level. * The post holder will not have direct line management responsibilities, but they will be accountable for the effective coordination and management of health records across multiple services. |

## Job Purpose

The post holder will be responsible for the coordination and management of health records when a new NHS number is issued for a patient, ensuring the effective transfer, merging, and maintenance of records in compliance with relevant policies, regulations, and data protection requirements.

They will act as a central point of contact and specialist advisor for clinical teams, social care, and other relevant services involved in supporting patients through the NHS number transition process. The post holder will be responsible for developing and implementing processes to support the seamless management of health records throughout.

The post-holder will contribute to the development and implementation of Trust-wide policies and procedures related to health records management.

The Role involves complex decision making and providing expert advice on records management, particularly during NHS number changes, with a high level of autonomy.

This role will be a Medical Records Subject Matter Expert supporting the clinical, administrative, systems admin and information governance processes ensuring the safe management of both current and future health records within the Trust.

## Key Responsibilities

### Health Records Management and Information Governance

1.1 Maintain and update patient health records throughout the NHS number change process, ensuring compliance with all relevant policies, regulations, and data protection requirements.

1.2 Coordinate the transfer, merging, and decommissioning of health records between services as children and patients move to a new NHS number, including consulting with external organisations as required.

1.3 Use specialist knowledge and skills to provide advice and guidance to clinical teams, social care, and other relevant services on the appropriate management of patient health records during the NHS number transition.

1.4 Develop and implement processes and procedures to ensure the accurate and confidential handling of children’s and patients’ health information during the NHS number changes, for example through adoption.

1.5 Monitor the status of children and patient health records, escalating any issues or risks to senior stakeholders as appropriate.

1.6 Maintain accurate and secure records of all pre- and post-NHS number change information, ensuring accessibility if required.

1.7 Audit the outcomes of the health records management approach on an ongoing basis and provide reports as required.

1.8 Analyses policies and procedures for the management of Health Records able to identify issues with processes and able to demonstrate problem solving skills to make corrections in line with legislation to acheive the expected standards.

1.9 Escalates to relevant subject matter expert when required with support of line manager for additional reference.

1.10 Develop and implement polices and procedures for health records management across the Trust, ensuring compliance with national standards and development of plans for the continuous improvement of records management practices.

1.11 Resolve complex health records issues that require in-depth analysis and innovative solutions, including those involving inter-agency cooperation or sensitive legal considerations.

### 2. Clinical Systems Administration

2.1 Assist in the development and implementation of processes and procedures for the effective management of children and patient health records throughout any NHS number change processes.

2.2 Take responsibility for the day-to-day coordination and monitoring of health record transfers, merges, updates, and corrections escalating any issues or delays to the relevant stakeholders.

2.3 Manage a comprehensive tracking system to ensure all health record tasks and actions are completed within agreed timescales.

2.4 Support the development and management of efficient information management systems and databases to enable the accurate storage, retrieval, and reporting of patient health records during transitions.

2.5 Undertake analysis of services, data and records to identify trends, risks, or opportunities for change make appropriate recommendations for action and to enable continuous improvement.

2.6 Create and maintain project initiation documents, plans, reports, risk and issues logs, and other documentation related to the implementation and business-as usual management of electronic patient health record systems.

2.7 Develop and maintain standardised documentation, templates, and procedures for patient health records across all relevant services.

2.8 Provide training and support to clinical teams, social care, and other relevant services on the appropriate management of patient health records.

2.9 Ensure digital and technology equipment used within the Clinical Systems team is maintained to a safe standard and reported appropriated where there are issues.

### 3. Leadership

3.1 Ensure a professional service and image is always maintained, acting as a role model to staff.

3.2 Provide a leadership style underpinned by values around equality, diversity, and openness; effectively build and maintain relationships with key stakeholders.

3.3 Promote diversity and equality in people management techniques and lead by example.

3.4 Take responsibility for own and others' health and safety in the working environment.

3.5 Comply with Trust policies and procedures.

3.6 Supervise and mentor junior staff, providing specialist guidance and support in health records management processes.

3.7 Lead Medical Records specialist training and oversee staff development to ensure high standards of service delivery.

3.8 Contribute to the development of Trust wide records management policies, able to align recommendations with changes in legislation

3.9 Negotiate with clinicians, admin staff and patients regarding policy changes and its impact on them as stakeholders.

3.10 Ensure day to day management of the Medical Records Function within Clinical Systems including line management of junior staff.

### 4. Learning and Development

4.1 Take responsibility for own professional development, undertaking self-directed study and formal learning opportunities.

4.2 Prioritise own workload within agreed objectives, referring to others as appropriate.

4.3 Participate in the Trust's appraisal system, matching organisational aims with individual objectives.

### 5. Communication, Partnership and Team Working

5.1 Actively develop and maintain effective working relationships within and outside the Trust, including with social care, adoption services, other relevant services, and clinical teams.

5.2 Explore opportunities for collaborative working and take the initiative to establish and sustain such relationships.

5.3 Actively contribute to multi-disciplinary teams, acting as a credible source of information for other agencies/professionals.

5.4 Responsible for developing and maintaining relationships through excellent communication, explaining, and justifying a point of view objectively to a broad range of internal and external stakeholders.

5.5 Understand the needs of internal and external stakeholders and keep them informed when taking actions or making decisions, to meet and, where possible, exceed requirements and expectations.

5.6 Provide effective direction and advice to both internal and external stakeholders and colleagues, delivering timely and accurate information and giving clear explanations where the nature of the information is potentially complex.

5.7 Maintain effective communication with senior managers, ensuring they are made aware of priority issues and negotiating compromises where service expectations do not match the level of service that can be offered.

5.8 Resolve enquiries from colleagues, internal and external stakeholders promptly and provide timely responses to emails and external enquiries.

5.9 Handle service user complaints tactfully, escalating to line manager when necessary.

5.10 Provide specialist medical records advice and guidance to children, parents and carers on non-clinical issues.

5.11 Provide specialist advice to senior management, clinical and administrative staff on information governance, data protection and legal aspects of health records management, ensuring that all processes align with current legislation and Trust policies.

5.12 Manage relationships with key stakeholders, including senior management, external agencies, and regulatory bodies, to ensure that health records management processes meet or exceed all requirements.

5.13 Communicate with public when required, particularly in situations where health records management issues are of public interest, acting as a representative of the Trust.

5.14 Negotiates with external organisations regarding Health Records management, including GP practices and other Trusts.

### 6. Innovation and Quality

6.1 Work with managers and colleagues to continually improve the quality of services within the overall organisational governance frameworks and objectives.

6.2 Identify, manage, and minimise risks within the organisational risk management frameworks, including understanding the role in safeguarding and incident management.

6.3 Ensure that service user experience is core to all service development, gaining support from appropriate corporate teams as required.

6.4 Actively contribute to the quality framework, outcome measures, and best practice standards to deliver an effective, high-quality service.

6.5 Actively contribute to the Trust’s Digital Strategy ensuring safe and compliant medical records management is considered as part of all projects where patient data is held.

6.6 Lead and manage projects related to health records management, including the implementation of changes to electronic health record systems and transition of records during organisational changes.

6.7 Initial and oversee quality improvement initiatives, conducting audits and implementing changes to improve service delivery.

## Health and Safety

### Responsibilities of ALL staff in relation to Health and Safety:

* Take reasonable care of own and others' health and safety.
* Cooperate with the Trust, following health and safety policies and procedures.
* Attend required health and safety training.
* Report and record any injuries, illnesses, or safety concerns.
* Ensure all equipment is safe and free from damage, reporting issues as appropriate

### In addition to these functions, the post holder is expected to:

* Perform other duties as may be reasonably expected in accordance with the grade of the post.

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| **Effort Factor Information** | |
| **PHYSICAL EFFORT**  What physical skills needed in the role require, speed, accuracy, dexterity and or manipulation of objects (includes both clinical and non-clinical posts)? Please provide specific examples.  Is the post holder required to lift equipment? If yes, please specify type of equipment, weight (approx. kilos) and frequency of the requirement. Please provide specific examples. | A combination of sitting, standing, and walking with little requirement for physical effort.  Standard keyboard skills |
| **MENTAL EFFORT**  Describe the amount of concentration required within the day-to-day job. What is it the employee will have to concentrate on? Please give examples of how often and for how long this concentration occurs. Please provide specific examples of when mental effort is required.  Is the post holder required to drive a vehicle? If so, please specify duration and frequency. | Frequent requirement to concentrate for prolonged periods when writing reports/analysing data related to the project. Interruptions will also occur which will require immediate response as post holder will act as main contact for end users.  There is a requirement to ensure accuracy in checking wording and meaning. |
| **EMOTIONAL EFFORT**  Does any part of the job require any emotional effort? What elements of the role expose the employee to emotional effort?  How often does this happen? Please provide specific examples. E.g. exposure to child protection issues | Occasionally exposed to distressing situations as first port of call for end users |
| **WORKING CONDITIONS**  Is the post holder required to work in extreme heat or cold, with smells, noise or fumes which are unavoidable, even with the strictest health and safety controls? Does the post holder work with clients or patients who express aggressive verbal or non-verbal behaviour or similar. Please describe the requirement and the frequency with which this may occur. | The employee is exposed to normal office-working conditions.  Most of the work of the employee is based around the computer however there are some tasks that do not require VDU input.  Communication with patients, relatives and stakeholders on a daily basis where challenging conversations may be required regarding complaints, duty of candour and disagreements around information sharing. |

**TERMS AND CONDITIONS OF SERVICE**

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| **Band:** | 5 |
| **Hours:** | 37.5 |
| **Contract:** | Fixed-Term for 12 Months |
|  | £29,970 - £36,483 per annum |
|  | New staff will normally be appointed to the minimum of the pay band. Staff transferring from one post to another in the same pay band within the NHS will enter the band at the same point that they were previously on. Staff promoted within the NHS will enter the new pay band at the minimum or the first point of the new pay band that gives them an increase in salary. Any previous NHS service will be subject to confirmation by the Payroll Department. |
| **Annual Leave:** | The annual leave year runs from 1 April to 31 March following. The full entitlement being 27 days for a full year and pro rata for an incomplete year's service. An additional 2 days will be awarded after 5 years’ service plus a further 4 days after 10 years’ service. This is in addition to eight public and statutory days holiday. |
| **NHS Pension:** | The post is pensionable unless you opt out of the scheme or are ineligible to join and your remuneration will be subject to deduction of contributions in accordance with the National Health Service Pension Scheme. In the event of you not wishing to join the scheme you should complete form SD502 on your commencement date. |
| **Medical:** | The appointment maybe subject to you completing a declaration of health form, which may lead to a full medical examination upon request. |
| **Notice:** | Giving notice – you are required to give the Trust 8 weeks written notice of termination of your employment.  Receiving notice – with the exception of ‘Summary Dismissal’ you will be entitled to receive notice of 8 weeks or your statutory notice entitlement whichever is the greater.  Statutory entitlement is:  For staff with more than 4 weeks continuous service, entitlement to notice is 1 week for each year of completed service up to a maximum of 12 weeks. |
| **PROFESSIONAL REGISTRATION**  Where it is a requirement as part of this job role to be registered with a Professional Body, you are required to maintain and update your registration in line with the Trust’s Professional Registration Policy. You are required to provide proof of your registration status on your appointment, at renewal of registration or at any other time as requested by the Trust. It is also a requirement for you to comply with any Codes of Professional Conduct and to update/satisfy any Continuous Professional Development conditions.  It would also be a requirement for you to comply with any Codes of Professional Conduct and to update/satisfy any Continuous Professional Development conditions.  **REHABILITATION OF OFFENDERS ACT 1974**  Because of the nature of the work for which you are applying, this post is exempt from the provisions of Section 4(2) of the Rehabilitation of Offenders Act 1974. Applicants are, therefore, not entitled to withhold information about convictions which for other purposes are 'spent' under the provisions of the Act, and, in the event of employment any failure to disclose such convictions could result in dismissal or disciplinary action by the Trust. Any information given will be completely confidential and will be considered only in relation to an application for positions to which the Order applies.  **DBS CHECK (Formerly CRB)**  This post is subject to the Rehabilitation of Offenders Act (Exceptions Order) 1975 and as such it will be necessary for a submission for Disclosure to be made to the Disclosure & Barring Service to check for any previous criminal convictions.  The Trust is compliant with the Disclosure & Barring Service ‘Code of Practice,’ a copy of which is available on request.  The Trust welcomes applications from a wide range of candidates including those with a criminal record. It undertakes not to discriminate unfairly against any subject of a Disclosure on the basis of a conviction or other information revealed. A full Trust policy on the Recruitment of Ex-offenders is available on request.  **SECTION 11 COMPLIANCE**  **Safeguarding Children and Vulnerable Adults**  All employees are required to act in such a way that at all times safeguards the health and wellbeing of children and vulnerable adults. Familiarisation with and the adherence to the Trust’s Safeguarding policies is an essential requirement of all employees as is participation in related mandatory/statutory training.  **ORGANISATIONAL AND STATUTORY REQUIREMENTS**  All employees should understand that it is their personal responsibility to comply with all organisational and statutory requirements, e.g. Health and Safety; Equal Treatment and Diversity; Confidentiality; Infection Prevention and Control.  **MENTAL CAPACITY ACT (MCA 2005 CODE OF PRACTICE)**  This Act applies to all persons over the age of sixteen who are judged to lack capacity to consent or withhold consent to acts which are considered by health and social care professionals to be in the best interests of their welfare and health.  The Mental Capacity Act 2005 imposes a legal requirement on health and social care professionals to ‘have regard to’ relevant guidance within the Code of Practice when acting or making decisions on behalf of someone who lacks capacity to make the decision for themselves. Furthermore, they should be able to explain how they had regard to the Code when acting or making decisions.  Detailed guidance is available in the Mental Capacity Act 2005 Code of Practice http://www.dca.gov.uk/legal-policy/mental-capacity/mca-cp.pdf.  **NOTE**  This job description does form a part of the contract of employment and indicates how that contract should be performed. The job description will be subject to amendment in the light of experience and in consultation with the postholder.  **JOB SHARE**  This post is suitable for job sharing and when filled on this basis will attract all normal terms and conditions of service outlined above, but on a pro rata basis if appropriate.  **SMOKING**  The Trust operates a no smoking policy and is smoke free. | |

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# PERSON SPECIFICATION – Medical Records Support Officer

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| **Attributes** | **Essential** | **Desirable** | **How identified?** |
| **QUALIFICATIONS & TRAINING** | English & Maths to GCSE grade 9-4 or equivalent qualification/experience  Degree level in management, health records management, or equivalent experience or qualification  Level 2 IT skills (e.g. OCR/RSA or equivalent)  Must be willing to participate in any relevant training identified to develop skills required to perform duties  Evidence of Continuing Professional Development and maintenance of professional registrations where applicable. | Diploma in Health Record & Information management or equivalent  Quality Improvement or Project management qualification (e.g. QSIR or AGILE) | Application Form  Interview |
| **EXPERIENCE** | Experience of health records management, project administration, or office management  Experience of project management particularly related to health records management projects or organisational changes.  Experience in developing and implementing health records management policies at an organisational level.  Experience of managing and analysing health records information | Experience of working within the NHS  Experience collaborating with clinical teams, social care, and other external stakeholders on NHS number changes.  Experience of supervising and mentoring staff, leading training and development initiatives in a health records setting | Application Form  Interview |
| **KNOWLEDGE & UNDERSTANDING** | Working knowledge of health records administration processes and systems  Advanced knowledge of information governance, data protection and legal aspects of health records management, with the ability to provide specialist advice at a senior level.  Awareness of health records management standards, GDPR, NHS Confidentiality Code of Conduct, and financial guidelines  Understanding of the needs and processes involved in health records management for vulnerable populations (e.g. adopted children, gender transition)  Works to clear occupational policies, work is managed rather than supervised, works autonomously.  Advanced critical thinking skills with the ability to analyse complex situations and develop innovative solutions, particularly I the context of health records management.  Excellent communication and stakeholder management skills with the ability to engage effectively with senior management, external agencies and regulatory bodies. | In-depth knowledge of health records management policies, procedures, and best practice | Application Form  Interview |
| **PRACTICAL & INTELLECTUAL SKILLS** | Ability to train staff within specified areas.  Ability to adapt to changing milestones, assess problems, and identify solutions.  Ability to analyse complex information requiring interpretation to meet service/project requirements.  Competent in Microsoft Office and skills to collect, interpret, and present data.  Ability to work without direct supervision, prioritise, and act on own initiative.  Effective interpersonal and communication skills to provide clear, concise information.  Ability to provide contentious information to staff and communicate sensitive information.  Flexible approach to meet conflicting demands.  Effective time management skills to meet deadlines.  Diligence and accuracy. | Ability to use Microsoft Office or similar word processing, spreadsheet, and project management software.  Experience developing effective written and verbal communication systems. | Application Form  Interview  Test |
| **ATTITUDE & BEHAVIOUR** | Sensitive to the needs of others with awareness and responsiveness.  Values differences and appreciates diversity in the workplace.  Able to work as part of a team, cooperating and assisting others.  Able to develop, establish, and maintain positive relationships.  Able to work under pressure, dealing with peaks and troughs.  Cheerful outlook to change, flexible and adaptable.  Highly motivated and dependable.  Demonstrates values consistent with the Trust.  Strong personal integrity, dependable and reliable. | Ability to mentor and support others  Initiative-taking in identifying opportunities for service improvement.  Ability to take full responsibility for the management complex records related issues, making autonomous decision that have significant implications for the Trust. | Application Form  Interview  References |
| **Please delete as applicable:** Car owner/driver or suitable alternative transport to enable you to undertake the job (it is unlikely that public transport will meet this requirement). Reasonable adjustments can be considered in accordance with the Equality Act. | | | |