

○ Incumbency
BASED ONLY ○

POSITION DESCRIPTION (Please Read Instructions on the Back)

1. Agency Position No. 671-447-A

2. Reason for Submission: Redescription Reestablishment New Other

3. Service: Hdqtrs Field

4. Employing Office Location: ALMD

5. Duty Station: San Antonio, TX

6. OPM Certification No.

7. Fair Labor Standards Act: Exempt Nonexempt

8. Financial Statements Required: Executive Personnel Financial Disclosure Employment and Financial Interest

9. Subject to IA Action: Yes No

10. Position Status: Competitive Excepted (Specify in Remarks) SES (Gen.) SES (CR)

11. Position Is: Supervisory Managerial Neither

12. Sensitivity: 1-Non-Sensitive 2-Noncritical Sensitive 3-Critical 4-Special Sensitive

13. Competitive Level Code: X02

14. Agency Use: Bus: 1272

15. Classified/Graded by: [] Official Title of Position: File Clerk

Pay Plan: GS Occupational Code: 305 Grade: 5 Initials: mm Date: 3-29-10

16. Organizational Title of Position (if different from official title): File/Scanning Clerk

17. Name of Employee (if vacant, specify):

18. Department, Agency, or Establishment: Department of Veterans Affairs

a. First Subdivision: South Texas Veterans Health Care System

b. Second Subdivision: Medical Administration Service

c. Third Subdivision: Health Information Management Section

d. Fourth Subdivision:

e. Fifth Subdivision:

19. Employee Review-This is an accurate description of the major duties and responsibilities of my position.

20. Supervisory Certification. I certify that this is an accurate statement of the major duties and responsibilities of this position and its organizational relationships, and that the position is necessary to carry out Government functions for which I am responsible. This certification is made with the knowledge that this information is to be used for statutory purposes relating to appointment and payment of public funds, and that false or misleading statements may constitute violations of such statutes or their implementing regulations.

a. Typed Name and Title of Immediate Supervisor: REY OROZCO
Assistant Chief, Business Office/MAS

b. Typed Name and Title of Higher-Level Supervisor or Manager (optional): JO ANN H. ARAUJO, FACHE
Chief, Business Office/MAS

Signature: [Signature] Date: 3/23/10

Signature: [Signature] Date: 3/23/18

21. Classification/Job Grading Certification. I certify that this position has been classified/graded as required by Title 5, U.S. Code, in conformance with standards published by the U.S. Office of Personnel Management or, if no published standards apply directly, consistently with the most applicable published standards.

22. Position Classification Standards Used in Classifying/Grading Position: Position GS for Mail File Series, SS-0305, TS-34, dtd 1/79, TS-27 dtd May 1977

Typed Name and Title of Official Taking Action: MARYANN MARELION
Supv Consolidated Classification Unit

Signature: [Signature] Date: 3-29-10

Information for Employees. The standards, and information on their application, are available in the personnel office. The classification of the position may be reviewed and corrected by the agency or the U.S. Office of Personnel Management. Information on classification/job grading appeals, and complaints on exemption from FLSA, is available from the personnel office or the U.S. Office of Personnel Management.

23. Position Review

	Initials	Date	Initials	Date	Initials	Date	Initials	Date	Initials	Date
a. Employee (optional)										
b. Supervisor										
c. Classifier										

24. Remarks: Risk level: Low FPL Incumbency BASED ONLY

25. Description of Major Duties and Responsibilities (See Attached)

File Clerk
GS-305-5, PD #671-447-A

INTRODUCTION: The File Clerk, GS-305-5, Health Information Management Section (HIMS), Medical Administration Service (MAS), South Texas Veterans Health Care System is primarily responsible for retrieving, scanning, indexing, filing and maintenance of the consolidated health record, both administrative and medical.

MAJOR DUTIES:

The incumbent receives, scans, indexes, and creates progress notes in the Computerized Patient Record System (CPRS). The incumbent is responsible for the destruction or proper disposition of records once the medical and administrative documentation is scanned and stored into CPRS. The incumbent will interface with personal computer (PC) applications, including VistA Imaging Capture, as well as, numerous DHCP/VISTA applications and the Medical Records Tracking System.

MEDICAL RECORDS

The incumbent pulls medical records (48 hours in advance) for scheduled and unscheduled appointments using computer printouts. Fills requests from individuals or departments conducting research or medical review and other special projects deemed appropriate by Supervisor, Medical Record File Room, by pulling and charging out the records in Medical Record Tracking System (RTS).

Utilizes the Medical Record Tracking System package in VistA computer program, to charge-out records and locate records that have not returned to the file room. Researches Appointment Management and Patient Profiles in the VistA menu options to research loose filing for records not in the file room (i.e. pulled for appointment, not returned from an appointment, in the Doctor's Workroom, etc.).

Ensures that all medical records are retrieved prior to a scheduled clinic appointment and that all records for unscheduled (walk-in) patients are retrieved in a timely manner and are appropriately completed with loose documents filed in the proper location.

The incumbent ensures that medical records required for emergency situations are treated with the highest priority. The incumbent ensures prompt delivery and pickup of medical records on a daily basis to/from designated Ambulatory Care activity areas.

Searches for records that are (1) misfiled in the file room or (2) have not been returned (may be clinical or administrative areas within the hospital) and are required for health care delivery or administrative actions.

All medical records returning to the file room must be checked into the computerized Record Tracking System and filed on the shelf in sequential terminal digit order on a daily basis. When refilling, any loose documents will be incorporated into the Consolidated Health Record in accordance with VHA Handbook 1907.1 prior to filing on the shelf to ensure the continuity of patient care (both *in* the administrative and medical folder).

Utilizes Record Inquiry menu option in VistA to determine location of records not returned to the file room at the end of each business day.

Pulls and charges out in VistA Medical Records Tracking System records as requested for audits,

research, quality management, release of information, etc.

Initiates a new folder whenever thickness of current folder exceeds two inches or when folder is in disrepair.

Provides on-the-job training to students assigned to the file room unit.

Communicates with the appropriate administrative, clinical and ancillary staff regarding necessary action of a routine basis.

Establishes and maintains a working relationship with the administrative and professional staff as well as coworkers, always projecting tact, diplomacy and consideration.

Fully protects the confidentiality of patient information, access to computer files and release of access codes, according to established guidelines and policies.

Performs miscellaneous administrative and technical duties as required and assigned for the efficient operation of Health Information Management Section.

Submits weekly accurate production reports to immediate supervisor and advises the immediate supervisor of any backlogs or potential problems.

SCANNING

This position is responsible for carrying out a variety of health information functions. The incumbent performs duties related to the receipt, scanning, indexing and destruction of health and administrative information. The incumbent will interface with personal computer (PC) applications as well as numerous VistA applications. In this regard, the incumbent will index each scanned document into a SQL database, which will be accessed via CPRS (Computerized Patient Record System) and GUI tools, then associate each scanned document with the correct patient's CPRS record, the appropriate TIU document, assign the appropriate document-named nomenclature and electronically "sign on chart" scanned documents.

The incumbent will utilize the VistA Imaging Capture software to create new consult notes to associate with the scanned documents. Performs data entry to include additional information as necessary (specialty, date of appointment, origin of appointment).

When records are received, the incumbent will ensure that all necessary health/administrative information is integrated into Computerized Patient Record System (CPRS) through the PC scanning software and hardware. The incumbent must index this information using VistA Imaging application and bridges. After the scanning and indexing process is complete, the incumbent will confirm information interchange by communicating with clinical and administrative team members.

The incumbent will maintain a daily productivity log of scanning and indexing activities. The production log will be provided to the Medical Records Supervisor by the next workday.

The incumbent is responsible for tracking, retrieving and performing follow-up activities on health records.

Timeliness, accuracy, and organizational skills are essential to ensure that information is available for patient care. Communication skills are required to properly coordinate records transfers, record

follow-up, and record scanning and indexing functions with clinical team members.

The incumbent sorts loose health record documents on a daily basis, scans and indexes materials accordingly within established guidelines and makes the proper disposition of documents for unavailable records.

The accuracy of entering/capturing workload and assuring the completeness of health records are critical components of this position.

Performs duties related to the receipt, scanning, indexing and assignment of appropriate nomenclature to health and administrative information, as assigned, for incorporation into the correct patient's record in CPRS and filing of health and administrative information in the Consolidated Health Record. The incumbent will interface with personal computer (PC) applications as well as current and numerous VistA and CPRS applications. After scanning and indexing process is complete, the incumbent will confirm information interchange.

The incumbent will maintain a daily productivity log of scanning and indexing activities. The productivity log will be provided to the Chief, HIMS by the next workday.

FACTOR LEVELS

FACTOR 1: KNOWLEDGE REQUIRED BY THE POSITION

Thorough knowledge of multiple systems and current computer technology regarding imaging and scanning applications and numerous VistA applications including VistA/menu options and CPRS list manager and GUI software, TIU documents and title nomenclatures and Medical Record Tracking system.

The incumbent must have an excellent knowledge of the VA Hospital's file systems and procedures, knowledge of health information management policies and procedures, and The Joint Commission (TJC) and VA standards regarding requirements for inpatient and outpatient medical records.

Incumbent must be knowledgeable of the organization of both the medical and administrative record, VHA file system and procedures, records retention and procedure relating to the transfer and other disposition of hard copy records.

The incumbent must have basic knowledge of the Privacy Act of 1974 and VA regulations governing the release of information. This concerns safeguarding the confidentiality of the variety of material that will be handled.

Must have basic knowledge of the flow of health information and the retrieval of health information both within this section as well as throughout the hospital.

Knowledge of the functions performed within the units serviced to determine the subject matter of diverse types of records information, correspondence, and forms for filing and scanning purposes.

Thorough knowledge of the content, structures and component parts of the medical record as prescribed by TJC to appropriately index and title medical information.

Basic knowledge of anatomy and medical terminology is required to properly analyze medical information for scanning and identification purposes.

Basic knowledge of all VA regulations and TJC standards as they relate to the maintenance of health information.

Working knowledge of relationships within STVHCS to include the satellite outpatient clinics and Community Based Outpatient Clinics in order to manage daily operations.

A qualified typist is required to perform data entry responsibilities.

FACTOR 2: SUPERVISORY CONTROLS

The incumbent is under the direct supervision of the GS-305-7 Supervisory File Clerk who is responsible for observing, monitoring and facilitating performance in accordance with applicable standards. Additional guidance may be provided by a lead clerk. The incumbent is expected to perform independently, solving normal problems using own initiative with referral of unusual problems.

The File Room Supervisor advises the incumbent of any changes in established procedures and completes spot checks to assure that procedures are being followed.

The incumbent consults with the supervisor on complex problems where no precedent has been set.

FACTOR 3: GUIDELINES

Guidelines consist of VHA Handbook 1907.1, Health Information Management and Health Records, Privacy Act of 1974, Health Insurance Portability and Accountability Act (HIPAA), TJC standards, and STVHCS policies, and numerous technician and user manuals on PC applications. Employee uses initiative and judgment in selecting the most appropriate response to a specific situation.

Additional guidelines consist of numerous public laws applicable to the Health Information Management Section that are used to determine who may have access to the material and to what extent access is allowable. Hospital policies on control and maintenance procedures of medical records are both oral and written. Good judgment, past experience and initiative are pertinent.

FACTOR 4: COMPLEXITY

The incumbent is assigned filing, medical record charge out/in using Medical Record Tracking menu option and retrieval of both administrative and medical record folders as well as a multiplicity of contents in these folders. These duties include a variety of related activities, including searching, filing requests, association of data such as the correlation of records to the correct destination as the correct time, reviews material received for filing and determines by physician, time element, status of patient and other related data, the correct place for filing, and searching multiple sources for information to relate to materials received. Searching assignments involve incomplete or incorrect information requiring multiple sources to locate request records or material. This requires a rigid system of assuring proper charge out/in and periodically reviewing for the purpose of removing redundant material and maintaining proper order. Good memory and the close observation of detail is a necessity.

Good computer skills are necessary to carry out duties associated with the scanning and indexing of highly specialized medical information consisting of a variety of formatted forms (i.e. flow-sheets, narrative reports, non-VA medical reports) and classifying to appropriately titled nomenclatures.

Incumbent must be alert to detail and very attentive in accomplishing tasks associated with scanning to ensure documents are scanned to the correct patient's CPRS, to the correct TIU document, titled nomenclature, and indexed for immediate accessibility or retrieval.

Analytical ability is required in scrutinizing documents for classification, indexing and further screening of and prioritizing non-VA medical reports to be scanned.

Incumbent will be required to keep abreast of regulatory requirement governing scanning, maintenance and disposition of legal medical documents before and after scanning.

Patient records flow throughout the hospital and Frank Tejada Satellite Outpatient Clinic (or other Satellite and Community Based Clinics) in a complex administrative and clinical network. The record must be tracked throughout this network until it is located,

The incumbent must ascertain all the facts to locate a record. Information must be obtained from the Record Tracking System, the clinic or unit clerk or the individual to whom the record was last charged-out.

A high degree of accuracy is essential.

Varied duties of this position require a solid background in medical records and all aspects of processing same. In addition, there must be an understanding of this unit's performance in relation to other units and services.

FACTOR 5: SCOPE AND EFFECT

The purpose of this position is to provide paper and scanned medical documents in a timely and accurate manner. To assist in retrieving paper and scanned medical records for treatment, social services, eligibility determinations, support of claims for compensation and pension, etc. The presence or the absence of the medical record data/information directly affects the level of clinical treatment and services the veteran patient may receive. This essentially defines the position as a "direct patient care" administrative position.

This position is to scan medical reports not amenable to direct entry (i.e. advances directives, flow sheets, consents, informed consents, etc.) and numerous medical reports from non-VA facilities and private physician's offices. Failure to scan information appropriately, index appropriately, assign to appropriate TIU document and title nomenclature for immediate viewing could adversely impact and delay treatment of patients, compliance with requests for information, reliability of medical information, results in delays in coding for third party reimbursement and workload capture, and hinders research.

FACTOR 6: PERSONAL CONTACTS

Personal, telephone, and electronic contacts are with employees of all levels of the clinical and administrative staff, veterans and their families, and other VA and non-VA health care facilities, Contacts are for the purpose of obtaining the expeditious delivery of medical records of patients in need of care or for some medical-legal or administrative problem requiring resolution and answering questions on canned medical documentation.

Contacts are for the purpose of coordinating, training and assisting other clinic staff throughout

STVHCS with scanning tasks, resolving issues associated with scanning and obtaining advice and assistance from clinical staff on non-VA medical reports on identifying key documents to be scanned.

Personal contacts require diplomacy, sound judgment and tact in all dealings. Conducts self in a professional manner at all times.

FACTOR 7: PURPOSE OF CONTACTS

The purpose of contacts is to advise on search problems, obtain information helpful in difficult search areas, and to exchange information about files, records, indexes, etc.

FACTOR 8: PHYSICAL DEMANDS

Incumbent must have adequate eyesight and hand dexterity to allow for reading and operating computer terminals.

Routine physical activity is required and includes walking, bending, stretching, lifting, stooping and There is occasional lifting and carrying of bulky files and boxes. Some portions may be sedentary at times particularly in relation to scanning procedures.

Carrying, lifting, walking, stooping, reaching and retrieving are all part of the incumbents position and are required for most of the daily duties performed. These are required at various stages of analysis to check on missing records/documents and in keeping records routed to clinic physicians in a timely manner. Stooping and reaching are sometimes required to retrieve medical records from the files.

FACTOR 9: WORK ENVIROMENT

Works in the medical records file room. Uses safe work practices in avoiding trips and falls. Safety precautions are routinely exercised.

FACTOR 10: ADP SECURITY

In the performance of official duties, the employee has regular access to printed and electronic files containing sensitive data which must be protected under the provisions of the Privacy Act of 1974 and other applicable laws, federal regulations, Department of Veterans Affairs policies and directives. The employee is responsible for protecting the data from unauthorized release or from loss, alteration, or unauthorized deletion, and following applicable regulations and instructions regarding access to computerized files, release of access codes, etc., as set out in an automated information system security access agreement that the employee signs.

ADDENDUM

PATIENT SAFETY COMPETENCY STATEMENT

The incumbent will be responsible for promoting a culture of safety and will fully cooperate in efforts to improve patient safety and eradicate potential events including the reporting of events resulting in actual or potential injury to a patient. Incumbent must demonstrate knowledge of the reporting procedures involving safety issues relating to patients.

Position Designation of National Security and Public Trust Positions

Position Designation Record

Agency Department of Veterans Affairs
Position Title File Clerk
Series and Grade/Pay Band GS-305-4
Position Description Number 671-447-A

Designation Level	National Security	
	Investigation	Form Required
Tier 1	NACI	SF 85

Signature: Mary Ann Morelion Date: 3/29/2010
Name: Mary Ann Morelion, Supervisor,
Consolidated Classification Unit

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