

PATIENT UNIT SERIES

Code No.	Class Title	Occ. Area	Work Area	Prob. Period	Effective Date	Last Action
0788	Patient Unit Clerk I	04	441	6 mo.	00/00/00	Rev.
0789	Patient Unit Clerk II	04	441	6 mo.	00/00/00	Rev.
2450	Patient Unit Manager	03	441	6 mo.	00/00/00	Rev.
4619	Patient Support Services Coordinator	03	441	6 mo.	00/00/00	Rev.

Promotional Line: 238

Series Narrative

Employees in positions allocated to this series perform a variety of patient related support functions such as establishing and maintaining medical charts, completing forms and transcribing physician's orders. They coordinate arrangements for patient activities such as therapy, clinic and medical test appointments. They serve as an essential link between the assigned health care unit and various services and staff.

DESCRIPTIONS OF LEVELS OF WORK

Level I: Patient Unit Clerk I

0788

Working under direct supervision, perform a variety of routine clerical duties in order to provide quality patient care in a health care facility.

A Patient Unit Clerk I typically –

1. completes forms and documents to assist with the admission of patients; interviews patients to complete documents, case histories, and forms such as intake and insurance; completes insurance and other claim forms
2. communicates routine information to the patient (such as instructions on how to operate the telephone or television); escorts patients to their assigned rooms
3. verifies forms and records for completeness and appropriate signatures (such as lab-slips, x-rays slips); locates or monitors the location of medical charts
4. answers telephones, and direct calls to appropriate staff; answers, screens and routes telephone inquiries; receives, records, and transmits messages from various departments (such as dietary, x-ray or laboratories) concerning patient condition or treatment
5. opens and distributes mail; transmits correspondence and medical records by mail, e-mail, or fax; receives and routes messages and documents such as laboratory results to appropriate staff
6. greets visitors, ascertains purpose of visit, and directs them to appropriate staff
7. assists with the intra-hospital transfer of patients by communicating with receiving units and affected departments; arranges for patient transportation; completes related forms and records

8. assists with the discharge of patients by completing forms; giving directions to cashier's office and arranging for clinic appointments
9. posts information such as census, admission, discharge, transfer, death of patients on ledgers and records; updates bulletin boards; updates manuals
10. prepares reports (such as census reports, unit status); establishes new files and maintains existing files; maintains medical records, technical library, and correspondence files
11. operates office equipment such as voice mail messaging systems, and uses word processing, spreadsheet, and other software applications to prepare reports, invoices, financial statements, letters, case histories and medical records
12. performs job related errands such as escorting patients to clinics or treatment or delivering prescriptions
13. maintains clean waiting room area conditions
14. performs data entry; entering patient information into the health care facilities' management system, and assuring accuracy of data entered
15. performs other related duties as assigned

Level II: Patient Unit Clerk II**0789**

Working under general supervision, employees in an assigned patient unit of a health care facility perform responsible clerical, administrative, and certain clinical duties and functions including the transcription of physician's orders.

A Patient Unit Clerk II typically –

1. codes, stores and retrieves information concerning a patient's medical record either manually or via a computer information system; compiles and records medical charts, reports, and correspondence, using typewriter or personal computer
2. transcribes physicians' orders such as medication, diet, laboratory, x-ray, and activity
3. schedules and confirms patient diagnostic appointment, surgeries, and medical consultations; schedules business appointments for staff
4. responds to routine questions from patients and their families, visitors and medical staff
5. prepares documents such as diet sheets, birth certificates, medication cards, letters
6. completes payroll data and submits to the payroll office
7. orders clerical supplies
8. advise supervisor of any safety problems concerning unit

9. assists managerial personnel in the orientation of new clerks, interns, medical students or other personnel to the procedures of the unit
10. inspects equipment such as mechanical delivery systems, office machines, and reports malfunctions to appropriate persons; carries out manual procedures
11. records patients' medical history, vital statistics and information such as test results in medical records
12. prepares treatment rooms for patient examinations, keeps the rooms neat and clean
13. interviews patients to obtain medical information and measures their vital signs, weight, and height
14. authorizes drug refills and provides prescription information to pharmacies
15. operates office equipment such as voice mail messaging systems, and uses word processing, spreadsheet, and other software applications to prepare reports, invoices, financial statements, letters, case histories and medical records
16. performs duties at the lower level of this series
17. performs other related duties as assigned

Level III: Patient Unit Manager**2450**

Work under general supervision, employees in a health care facility direct and coordinate services auxiliary to the assigned health care unit.

A Patient Unit Manager typically –

1. implements departmental policies and procedures governing the installation and functioning of a patient unit auxiliary services program
2. establishes and maintains effective procedures for obtaining and maintaining patient unit supplies and equipment
3. evaluates clerical procedures in the patient unit in order to identify need for rescheduling routine activities in order to prevent peak work load periods
4. plans, directs and evaluates the work of assigned personnel
5. revises procedures such as procedures to accommodate new equipment, changes in carting procedures and/or the use of forms, in response to changing patient care programs
6. serves as liaison between the patient unit and other departments with responsibility for obtaining adequate auxiliary services such as those rendered by medical records, physical plant and laboratories

7. responsible for maintaining a satisfactory physical environment in the patient unit such as ensuring that equipment is properly placed, and maintaining the nurse's station in an orderly manner
8. monitors use of diagnostic services, inpatient beds, facilities, and staff to ensure effective use of resources and assesses the need for additional staff, equipment, and services
9. orients patient unit personnel to auxiliary services and procedures
10. communicates notification of test results to patients
11. verifies external referrals to the health care facility
12. perform duties at lower levels of the series as needed
13. performs other related duties as assigned.

Level IV: Patient Support Services Coordinator**4619**

Under administrative review, directs and coordinates non-clinical support services for acute, aseptic patient areas, such as operating or treatment rooms and/or diverse clinics within a health care facility.

A Patient Support Services Coordinator typically –

1. directly supervises non-clinical support staff assigned to a division, including responsibility for screening, hiring, orienting, evaluating, disciplining, training, ensuring staff compliance with policy and procedures, and updating position descriptions
2. plans and arranges work schedules for assigned personnel, including vacation usage and coverage for unplanned absenteeism
3. participates in clinical staff orientations, and coordinates or conducts ongoing staff development programs
4. conducts and administers fiscal operations, including accounting, planning budgets, authorizing expenditures, establishing rates for services, and coordinating financial reporting; justifies budgetary needs for staff, equipment, and supplies
5. verifies and submits all necessary payroll data for assigned personnel on a timely basis
6. ensures that all equipment is present and functioning in appropriate locations prior to and during use; responds to emergency requests from medical and nursing staff during surgical procedure or treatment
7. maintains communication between governing boards, medical staff, and department heads by attending board meetings and coordinating interdepartmental functioning; provides liaison between departments to arrange for and coordinate necessary support services
8. directs cleaning and sterilization of operating, recovery, pre-surgical and designated treatment rooms, as well as instrument processing area

9. inspects all assigned locations, ensuring safety, cleanness, appropriate levels of supplies, and properly functioning equipment
10. ensures that all new electrical equipment has passed bioinstrumentation standards prior to use and is reinspected at designated intervals
11. interacts with physicians to satisfy specific needs, such as individual requests for surgical preferences and special supplies
12. gathers and maintains statistical data for administrative reports, operating and recovery room logs, clinic utilization statistics, utilization reviews, Food & Drug Administration, and The Joint Commission regulations, and patient charges
13. prepares and submits requisitions for maintenance contracts for all supplies and equipment, ensures terms fulfilled by vendors, and keeps related service manuals
14. secures and maintains current product information and price lists from outside vendors to ensure cost containment; submits and tracks orders as appropriate
15. maintains appropriate levels of critical/mandatory supplies by conducting daily inventory of operating rooms, recovery rooms, pre-surgical units, clinics, locker rooms and offices
16. conducts fiscal inventory of supplies, equipment and furnishings; maintains records to document changes in that inventory
17. develops and maintains computerized record management systems to store and process data such as personnel activities and information, to produce reports
18. supervises office personnel in health care facility areas such as patient registration, transcription, immunization compliance, insurance and bursar billing, switchboard, customer service, information desk, and patient medical information including and not limited to medical release of information
19. performs other related duties as assigned

MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO:

Level I: Patient Unit Clerk I

0788

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school graduation or GED

KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

1. Ability to communicate with others
2. Ability to work under pressure and amid interruptions

3. Ability to read, comprehend and follow complex instructions
4. Ability to work with persons from a variety of cultural, economic and educational backgrounds
5. Data entry ability

Level II: Patient Unit Clerk II**0789**

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school diploma or equivalent with courses in mathematics, health, biology, bookkeeping, computers, and office skills
2. Any one or any combination of the following, totaling one (1) year (12 months), from the categories below:
 - a) work experience comparable to that performed at the Patient Unit Clerk I level or in other positions of comparable responsibility
 - b) work experience in a health care facility such as a doctor, dentist or hospital office; which involved record keeping; working with the public, direct patient contact, answering telephones and working with medical terminology
 - c) graduation from an accredited medical secretarial or paramedical program

KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

1. Working knowledge of medical terminology
2. Skill in reading, comprehending and following complex instructions
3. Skill in communicating with others
4. Ability to deal with patients and their families
5. Ability to work under pressure and amid interruptions
6. Ability to work with people from a variety of cultural economic and educational backgrounds
7. Ability to use a medical dictionary
8. Data entry ability

Level III: Patient Unit Manager**2450**

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Any one or any combination of the following, totaling two (2) year (24 months), from the categories below:
 - a) work experience comparable to that performed at the Patient Unit Clerk II level or in other positions of comparable responsibility
 - b) college education with coursework in a medical or para-medical field
 - 30 semester hours equals 6 months
 - 60 semester hours equals 1 year (12 months)
 - 90 semester hours equals 2 years (24 months)
 - c) work experience in a medical or para-medical fields such as nursing assistant, medical assistant or medical secretary

KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

1. Skill in dealing with patients and their families
2. Skill in communicating with others
3. Skill in working under pressure and amid interruptions
4. Skill in explaining rules, policies and their interpretations
5. Supervisory ability
6. Ability to analyze and organize information
7. Ability to use a medical dictionary
8. Data entry ability

Level IV: Patient Support Service Coordinator

4619

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Bachelor's degree in health administration, health information management, business, or other related fields, such as business, medical or para-medical
2. Five (5) years (60 months) of hospital clerical experience or ancillary service experience three (3) years (36 months) of which must have included the performance of responsible non-clinical services auxiliary to the operations of an in-patient and/or out-patient unit

KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

1. Knowledge of medical terminology

2. Knowledge of aseptic techniques
3. Skill in dealing with patients and their families
4. Skill in communicating both in verbal and written form
5. Computer skills
6. Supervisory ability
7. Ability to analyze and organize information

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