

Position: **Note Preparation Team – Clinical Records**

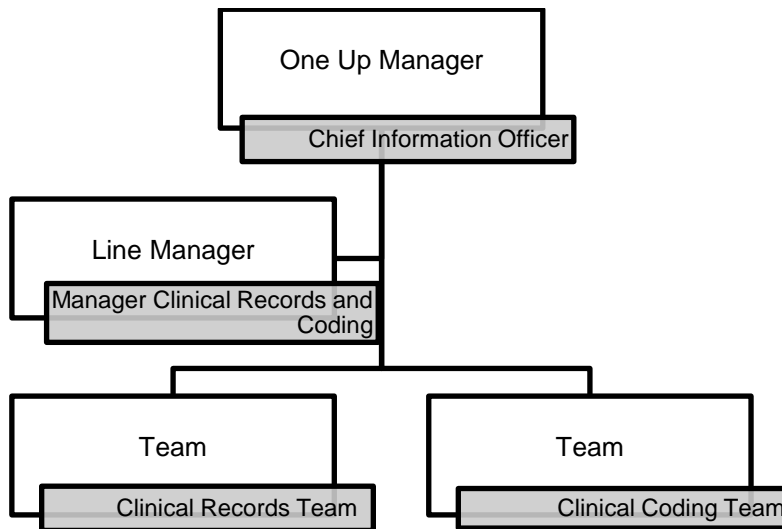
Responsible to: Manager Clinical Records and Coding

Direct Reports: Nil

Location: Rotorua & Taupō

Functional relationships:	Internal:	External:
	Administrative Staff Nursing Staff Allied Health Staff Medical Staff Other Departments	GP's Other Hospitals Police ACC Members of the public All other providers of care to Te Whatu Ora Lakes patients

Date: **May 2023**



Primary purposes of the position

- Ensure the timely availability of electronic documentation, the delivery of patient records, and the provision of supporting documentation to the services involved in providing specialist outpatient clinics, placing emphasis on the completeness and appropriateness of clinical information.
- Ensure that relevant clinical information is filed accurately and that patient records are readily locatable for on-going patient care, with responsibility for a dedicated area of the departments active filing room.
- Take an active role in a dedicated team involved in the provision of a quality Clinical Records service which is critical to effective and on-going patient care.

Key Objectives	Description	Expected Outcomes
1. Patient Information	Preparation of hard copy and electronic patient documentation as required for specialist outpatient clinic attendances within agreed timeframes.	<ul style="list-style-type: none"> • Reports and results specific to individual specialties are obtained and made available for continuity of patient care in the clinic environment • All identified documentation for agreed paper-light clinics is scanned, saved with the appropriate metadata, and is available in LCWS – Lakes Clinical Workstation • Hard copy patient records contain the most recent correspondence, reports and results available; that these are secured in the record and are readily accessible by the clinician within the appropriate section of the record
2. Clinic Preparation	<ul style="list-style-type: none"> • Ensure the documentation required for each clinic is made available to facilitate the smooth running of the clinic. • Action Radiology requests for Orthopaedic and Medical outpatient clinics as indicated. 	<ul style="list-style-type: none"> • Clinic lists, referral documents, patient labels, and specialty Outcome forms are prepared in advance and are readily available as required. • Delays are minimised for both clinicians and patients as requirements for Radiology services are pre-planned and able to be provided in a timely manner.
3. Electronic Documentation – Scanning	<ul style="list-style-type: none"> • Scan and save patient correspondence and results from tertiary providers, and other agreed documents, for uploading into LCWS to provide electronic access to non-Lakes clinical information and to minimise the provision of hard copy patient records for those patients requiring on-going care. • To have a commitment to the further development of electronic documentation to provide greater access to shared information and improved communication. 	<ul style="list-style-type: none"> • Documentation for Lakes patients becomes increasingly available in electronic format on the clinical information system for clinical and administrative purposes. • Confidence in electronic documentation is generated and maintained to support further roll-out of paper-light outpatient clinics. • Processes meet the legislative requirements for the electronic storage of documentation covered by the Public Records Act.
4. Filing - Incoming	<ul style="list-style-type: none"> • Assist with filing in-coming correspondence, reports, and results into the appropriate sections within the patient record. 	<ul style="list-style-type: none"> • Patient records contain the most recent correspondence, reports and results available, and these are easily located within the appropriate section of the record.
5. Culling	<ul style="list-style-type: none"> • Assist with the culling of non-active patient records in accordance with the Public Records Act (2005) and Lakes District policy. 	<ul style="list-style-type: none"> • The active filing room is kept current and access to non-active patient records is maintained.

6. Filing – Patient Records	<ul style="list-style-type: none"> Assist with filing patient records accurately and in accordance with the alpha numeric filing system. 	<ul style="list-style-type: none"> All patient records, when not in use, are appropriately filed in the main filing room and are readily locatable when required.
7. Filing Rooms	<ul style="list-style-type: none"> Carry out duties in filing areas in such a way that they are at all times tidy and safe for other users of the service. 	<ul style="list-style-type: none"> The filing rooms are a safe working environment for staff including the after-hours users of the department.
8. Tracking	<ul style="list-style-type: none"> Make full and appropriate use of the electronic tracking system to facilitate speed and accuracy in locating patient records for all patient records leaving and returning to the department. Assist with ensuring that all patient records returned to the department are electronically logged to the appropriate location and distributed accordingly. Assist with monitoring the electronic request screen and action requests appropriately. 	<ul style="list-style-type: none"> The rapid retrieval of patient clinical records is ensured with records not currently in the filing room being easily locatable by use of the electronic tracking system. All patient records returned to the department are appropriately tracked to the main filing room, or correct location within the office, and are readily locatable when required. A timely and up to date service for requesting patient records is provided to all users.
9. Communication	<p>Liaise with all departments and external agencies necessary to ensure the availability of patient information.</p>	<ul style="list-style-type: none"> Patient documentation is up to date for clinical use either by electronic or hard copy access Patient records are forwarded as required for acute or on-going patient care. Co-operative interdepartmental and external agency relationships are maintained at all times.
10. Customer Focus	<p>To be dedicated to the provision of a service that is customer-focussed with a recognisable commitment to accuracy and attention to detail. To actively contribute to continuous quality improvement within the service for positive outcomes and improved customer satisfaction.</p>	<ul style="list-style-type: none"> The Clinical Records Department provides a quality and effective service to all customers and authorised users of patient information.



Capabilities	Capability definition	Achievement Indicators
Communication and Personal Interaction Te Ringa Hora <i>the open hand (denoting someone who is sociable)</i>	<p>Openly communicates and cooperates with all levels of DHB employees, patients and visitors.</p>	<ul style="list-style-type: none"> • Listens actively, absorbs message and responds appropriately. • Builds effective working relationships. • Establishes rapport with others and gains their respect while being adaptive in relating to different types of people and situation. • Openly and constructively participates in conversations with colleagues, patients, managers and visitors • Patients and visitors are appropriately welcomed and treated while within the DHB • Collegiality with team mates and all staff. • Accepts differences of opinion can occur but these happen respectfully and without any continued animosity
Strategy & Performance Te Ringa Raupā <i>the roughened hand (symbolising a hard worker)</i>	<p>Spends energy on delivering role requirements and meeting objectives</p> <p>Organises own time to deliver on required tasks and duties</p>	<ul style="list-style-type: none"> • Has an energetic approach to work and is self motivated. • Accepts direction and instruction of manager but is able to work effectively without direction or guidance. • Organises time and resources effectively. • Understands and work towards achievement of the organisation's goals. • On shift is busy completing shift duties. • Utilises effective time management strategies to meet shift duties and works towards achieving objectives in any spare moments.
Development and Change Te Ringa Ahuahu <i>the hand that shapes or fashions something (refers to someone who is innovative)</i>	<p>Accepts change in day to day practices and contributes to decision making of the team.</p> <p>Makes suggestions to increase efficiency of the unit.</p>	<ul style="list-style-type: none"> • Can adjust behaviour to the demands of the work environment in order to remain productive through periods of transition, ambiguity, uncertainty and stress • Works with managers and team to make any changes within practices work • Contributes to change processes, offering solution based ideas • Constructively makes suggestions to improve process or practices and gain efficiencies • Accepts when ideas are not accepted for implementation
Personal Accountability Te Ringa Tōmau <i>the hand that is trustworthy</i>	<p>Is open with manager and colleagues and open to accepting feedback and critique to improve upon practice.</p> <p>Looks for and undertakes development activities appropriate for role and career development.</p>	<ul style="list-style-type: none"> • Offers constructive criticism and accepts feedback. • Establishes rapport with others and gains their respect while being adaptive in relating to different types of people and situations, to allow improvements to be made. • Accepts all feedback and participates in feedback discussions appropriately • Responds and queries how improvements can be made • Advises manager wherever issues may be impacting on performance • Recognises areas that could be improved in own practice • Requests learning and development opportunities to enhance practice in role and/ or to assist where improvements can be made • Recognises and facilitates the rights of Māori clients and their whanau to participate in cultural activities. • Has a working knowledge of the Lakes DHB Māori communities.
Culture and Values Te Ringa Taurima <i>the hand that nurtures, encourages, supports</i>	<p>Operates in line with DHB values and expectations and professional codes of conduct.</p>	<ul style="list-style-type: none"> • Demonstrates a commitment to cultural safety by meeting and exceeding the cultural needs of clients / customers / colleagues. • Incorporates the Lakes Way into day to day business activities • Shows respect for patients, colleagues.

- Utilises the Lakes Way philosophy to engage with patients, visitors and other staff.

Compulsory Requirements	Description	Expected Outcomes
Māori Health	Māori philosophies and values of health are demonstrated in work practice.	<ul style="list-style-type: none"> • Meaningful relationships are established with Te Huinga Takiora Māori in the planning and delivery of services. • Practices are consistent with Te Tiriti o Waitangi /The Treaty of Waitangi when working with Māori. • Delivery of safe services for Māori are facilitated by ensuring they can access treatment options and are involved in the planning and delivery of their care. • Māori are enabled to access and participate in cultural activities provided by the Lakes DHB. • A commitment to improving the wellbeing of Māori by increasing cultural knowledge in the Lakes DHB is shown.
Te Iti Kahurangi	The Lakes Way, Our Place Our Culture	<ul style="list-style-type: none"> • Works within the Te Iti Kahurangi framework and supporting guide document.
Record Keeping		<ul style="list-style-type: none"> • Complies with the Lakes DHB Corporate Records Management policy to create and maintain full and accurate records.
Quality & Risk	Patient safety is paramount to the service we deliver at Lakes District Health Board. This is to be achieved in a clinical governance framework that is culturally responsive and identifies and manages risk and opportunities to improve.	<ul style="list-style-type: none"> • Employees are supported to lead by example and implement a culture of continuous quality improvement. • Risks that may prevent Lakes DHB from achieving their goals are identified, reported, and managed. • Māori patients are provided patient-centred care to achieve positive Māori health outcomes. • Needs of Māori are reviewed and reported in the further development of practice, process and or policy. • Evidence-based methodologies are used to support improvements, e.g. kaupapa Māori methodology. • Quality care is provided to certification standards.
Health & Safety	Each individual is responsible for ensuring the safety of themselves, their colleagues, patients and their visitors and to comply with all organisational health and safety policies, procedures and guidelines.	<ul style="list-style-type: none"> • Implementation and reinforcement of a proactive healthy work place culture which reflects relevant Lakes DHB policy and legislative requirements. • Healthy lifestyles are actively promoted and participated in, within the work area. • Employees participate in Health and Safety within areas of work. • Health and Safety activities are appropriately documented within specified timeframes. • Health and Safety policies have been read and understood and are applied in the workplace. • Health and Safety policies are appropriately documented within specified timeframes and incidents are reported immediately. • Any opportunities for improving Health and Safety are reported and acted upon in a timely manner. • All near misses/incident/accidents are reported to the appropriate line manager within 24 hours.

Signatures:

Line Manager:
(position description approved):

Employee:
(acceptance of position description):

(Please also initial all other pages to show acceptance of position description)

Person Specification	Essential:	Desirable:
Education and Qualifications:	<ul style="list-style-type: none"> ▪ Secondary schooling ▪ Computer applications 	
Experience:	<ul style="list-style-type: none"> ▪ Administrative experience ▪ Proven ability to work autonomously 	
Knowledge:	<ul style="list-style-type: none"> ▪ Some knowledge of anatomy and medical terminology with an understanding of clinical issues and procedures, or similar health experience ▪ Te Tiriti O Waitangi in the provision of health care services and support to Māori. ▪ Te Tiriti O Waitangi in practice, process, policy development and decision making. 	<ul style="list-style-type: none"> ▪ An awareness of the Health Information Code and Privacy Act 1993
Skills:	<ul style="list-style-type: none"> ▪ Excellent computer skills ▪ Time management skills with the ability to meet set timeframes ▪ Organised, logical, and methodical planning and work processes ▪ Pronunciation of Te Reo Māori words and names 	<ul style="list-style-type: none"> ▪ Te Reo Māori
Personal Attributes:	<ul style="list-style-type: none"> ▪ A commitment to Lakes DHB Declaration of Fidelity; to maintain and promote confidentiality of all patient information both within and outside the hospital. 	<ul style="list-style-type: none"> ▪ Background in Health services with some clinical knowledge ▪ Experience in the provision of hospital administration duties ▪ Familiarity with hospital Patient Management Systems ▪ Non-smoker preferred.

ABOUT TE WHATU ORA LAKES

At Te Whatu Ora Lakes we place the highest value on the health and wellbeing of everyone in our community. As such all healthcare workers are expected to play a part in the creation and promotion of an environment which lives the following vision, mission and values:

VISION

Healthy Communities – Mauriora! In this vision Mauriora refers to the Mauri - being the life essence and the source of well-being, and ora - describing the state of wellness.

STRATEGIC MISSION

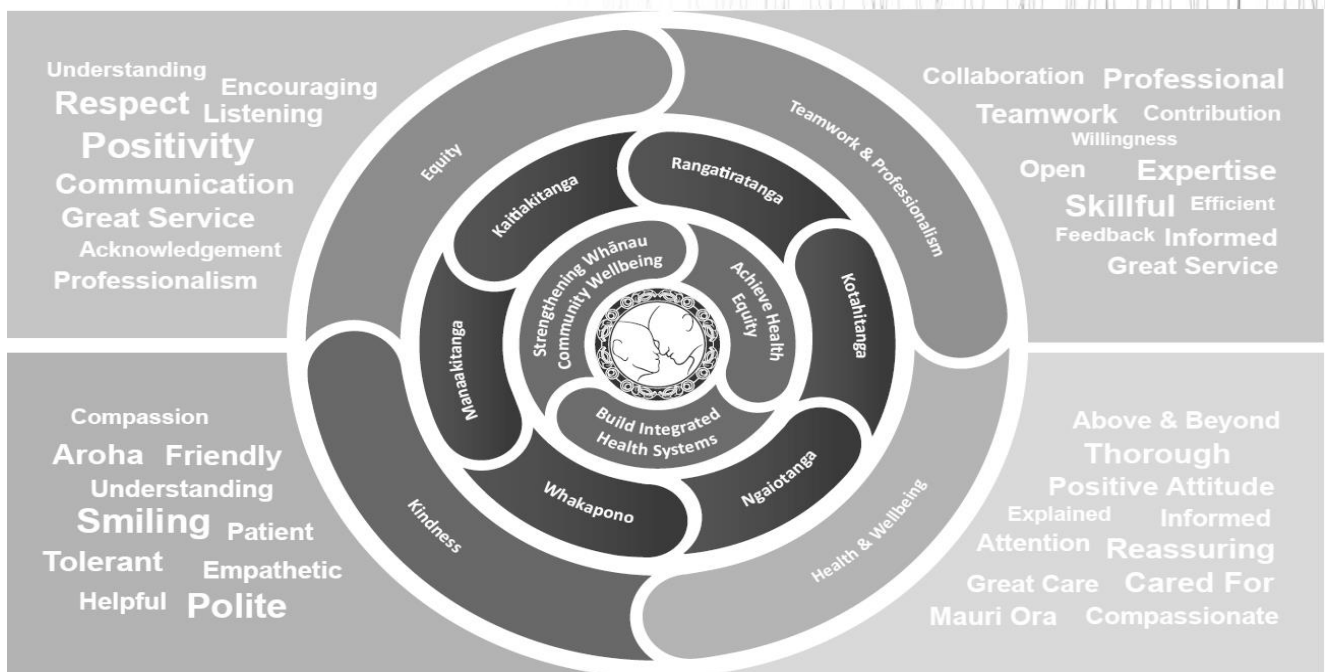


- Achieve equity in Māori health
- Build an Integrated health system
- Strengthen people, whanau & community wellbeing

THREE CORE VALUES

Manaakitanga	respect and acknowledgment of each other's intrinsic value and contribution
Integrity	truthfully and consistently acting collectively for the common good
Accountability	collective and individual ownership for clinical and financial outcomes and sustainability

TE ITI KAHURANGI – THE LAKES WAY, OUR PLACE, OUR CULTURE – WE WILL



TE TIRITI O WAITANGI

Our expression of Te Tiriti o Waitangi

The text of Te Tiriti, including the preamble and the three articles, along with the Ritenga Māori declaration, are the enduring foundation of our approach to achieving health and independence. Based on these foundations, we will strive to achieve the following four goals, each expressed in terms of mana.

Mana whakahaere

Effective and appropriate kaitiakitanga and stewardship over the health and disability system. Mana whakahaere is the exercise of control in accordance with tikanga, kaupapa and kawa Māori. This goes beyond the management of assets and resources and towards enabling Māori aspirations for health and independence.

Mana motuhake

Enabling the right for Māori to be Māori (Māori self-determination); to exercise their authority over their lives and to live on Māori terms and according to Māori philosophies, values and practices, including tikanga Māori.

Mana tangata

Achieving equity in health and disability outcomes for Māori, enhancing the mana of people across their life course and contributing to the overall health and wellbeing of Māori.

Mana Māori

Enabling Ritenga Māori (Māori customary rituals), which are framed by te ao Māori (the Māori world), enacted through tikanga Māori (Māori philosophy and customary practices) and encapsulated within mātauranga Māori (Māori knowledge).

Te Whatu Ora Lakes is committed within the framework of the New Zealand Public Health and Disability Act (2000) to supporting the Crown’s commitment to upholding its Tiriti promises.

ORGANISATION STRUCTURE

Te Whatu Ora
Health New Zealand
Lakes

