



TITLE: HEALTH SERVICES ASSISTANT I/II

FLSA: Non-Exempt

BOARD APPROVED:

BARGAINING UNIT: Misc.

DEFINITION

Under director general supervision, performs a variety of support activities for County clinics and behavioral or public health programs. Activities may include medical office support, word processing, data entry and organization, receipt of payments, telephone and counter reception, patient scheduling and intake, and maintaining, processing, and filing applications and medical records; creates routine correspondence and/or reports; provides information and assistance to staff and the general public; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives direct or general supervision from assigned supervisory or management personnel. May provide guidance and work direction to less experienced staff. Exercises no direct supervision over staff.

CLASS CHARACTERISTICS

Health Services Assistant I: This is the entry-level classification in the Health Services Assistant series. Initially under close supervision, incumbents learn and perform clerical duties in support of medical records, clinic, or program operations and performing special projects as assigned. As experience is gained, assignments become more varied and complex; close supervision and frequent review of work lessen as an incumbent demonstrates skill to perform the work independently. Exceptions or changes in procedures are explained in detail as they arise. It is distinguished from the Health Services Assistant II level in that the latter performs responsible and specialized support duties and may provide work direction to less experienced staff.

Health Services Assistant II: This is the journey-level classification in the Health Services Assistant series. Positions at this level are distinguished from the Health Services Assistant I by the performance of the full range of duties as assigned, working independently, and exercising judgment and initiative with general supervision. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. Incumbents perform a variety of specialized and more technical projects as well as provide guidance and work coordination for other staff.

This series is flexibly staffed, with assignment at and advancement to the appropriate level within the series based on departmental need and supervisory assessment of an incumbent's performance and experience.

EXAMPLES OF ESSENTIAL FUNCTIONS (Illustrative Only)

- Serves as a receptionist; receives and screens visitors and checks them in for appointments; receives and screens telephone calls, and takes messages; provides factual information regarding County, department, or center activities. Addresses issues and concerns from members of the public, vendors, and County staff; replies to voicemail and email messages; distributes literature pertaining to County services and events.
- Responds to inquiries and requests for information from clients/patients, families and staff in accordance with legal, regulatory and departmental policies and procedures; researches inaccuracies; adheres to privacy, security and consent mandates in the completion of requests. Enter reviews, processes and retrieves documents, including correspondence, memos, and statistical data, charts; processes records requests and other forms, ensuring accuracy and proper filing.
- Schedules patient appointments and prepares daily appointment schedule; schedules medical tests and procedures, as assigned; may gather and code diagnosis, procedures, and operations using health records for statistical indexing using ICD and CPT classification systems; prepares related statistical reports. Maintains records for program services, quality measures, uses electronic health records to collect and manage demographic, medical and billing information.
- Orders, receives, and organizes patient charts for daily appointment schedule preparation and varied record keeping activities; may pull and file charts located within assigned area; reviews charts for necessary documentation and authorizations from health care staff; processes and closes patient charts as authorized. Archives, maintains, verifies accuracy, researches discrepancies and audits files for compliance with federal, state and local laws and records retention schedules.
- Provides for intake and registration of patients; interviews patients to obtain medical information and appropriate documentation required to open patient charts; may assist clients with applications for various programs; explains program eligibility; and processes enrollment forms. Assists, receives, processes, and verifies various applications, permits, forms and other documents or completeness and conformance with established regulations and procedures.
- Performs a wide variety of routine and/or repetitive tasks such as preparing, copying, filing, billing and collecting, receipting, reconciling fees or other payments; enters, edits, and retrieves data and prepares agendas, bid packages, contracts, vouchers, educational materials regular or special reports; may perform high volume production typing/keyboarding/data entry.
- Reviews financial and insurance status of patients; provides and explains treatment costs and methods of payment; performs periodic re-evaluations, re-determinations and adjustments as necessary; collects fees, issues receipts and balances daily monies received. Prepares, maintains, verifies, and processes a wide variety of accounts payable and/or accounts receivable documents; maintains and updates related spreadsheets and records. May perform cashiering duties; balances cash register/drawer with checks, cash, and receipts, and prepares bags for courier to pick up; receives money and issues receipts; collects service fees.

- Provides information to patients or program participants related to program activities, educational material, and community resources; accompanies patients to meetings and appointments to provide support and facilitate better communication with service providers.
- Gathers information from a variety of sources for the completion and processing of forms, records, applications, and other documents; reviews forms and records for content, accuracy, completeness and compliance with regulatory, legal and organizational requirements; resolves routine errors, contacts individuals to obtain additional information, and completes records processing in accordance with policies and procedures.
- Enters, edits, and retrieves data; prepares periodic or special reports from a computer system following established formats and menus; may create report formats using programmed software to meet individual needs.
- Prepares information timely in accordance with agency statutory requirements; prepares records for court proceedings.
- Maintains records and processes various forms, applications, charts, or other documents specific to the center or program.
- Composes, types, formats, and proofreads a wide variety of reports, meeting minutes, letters, and memoranda with automated word processing and spreadsheet software; types from rough drafts, verbal instructions, or transcribing machine recordings. May assist in the contract development process. Proofreads and checks written materials for accuracy, completeness, compliance with departmental policies, and correct English usage, including grammar, punctuation, and spelling.
- Establishes and maintains office files; prepares, scans and indexes documents in online archive systems; verifies the accuracy of scanned documents and source documents and ensures documents are legible and properly indexed for accurate retrieval; purges files as required according to policies and procedures.
- May assist in ordering supplies and maintaining inventory for assigned programs; ensures immunization refrigerators and freezers are within required temperature range.
- Receives, opens, time stamps, sorts, and distributes incoming and interdepartmental mail; prepares, meters, and distributes outgoing mail. Retrieves, transfers, and delivers mail utilizing a County vehicle, files, records, and funds/deposits to and from County locations as requested by department.
- Opens, closes, and secures facilities pursuant to department policy.
- Reviews, verifies and processes documentation and eligibility for medical insurance during patient interactions and office operations.
- Serves as liaison between client's medical providers, vendors and other community agencies.
- Responsible for assigned County vehicle including delivery and pick up from approved vendors and reporting maintenance issues to appropriate staff.
- Compliance with all provisions of the Health Insurance Portability and Accountability Act of 1996 (HIPAA) if assigned to the Health Services Agency.
- Observes and complies with County and mandated safety rules, confidentiality, regulations, policies, and all relevant laws.
- Participates in special projects; attends training courses, meetings and conferences as assigned.
- Provides instruction and training to new staff as assigned.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Clerical practices and procedures
- County and assigned center programs, goals, and policies and procedures.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility
- Basic recordkeeping principles and practices
- Medical terminology related to health records and medical office support work
- Methods of preparing and processing various records, reports, forms, and other documents particular to assigned center or program
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and County staff
- Techniques of effective oral and written communication in English; proper spelling, rules of composition and grammar, and punctuation
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed
- Basic principles of scanning, filing, maintaining, archiving and retrieving records including Word processing methods, techniques, and programs; database and spreadsheet applications and programs
- Safe driving techniques
- Techniques for dealing effectively with and providing a high level of customer service to all individuals contacted in the course of work
- Techniques for dealing with people of all socio-economic levels under hostile and emergency situations
- General office business and administrative practices including basic business arithmetic
- Basic medical insurance principles, including insurance plans and forms
- Procedures for preparing, tracking and processing invoices, purchases orders, purchase requisitions and billings

Ability to:

- Perform specialized processes, procedures, and office support tasks related to the center or program to which assigned
- Perform detailed office support work accurately
- Extract medical information from patient charts
- Understand, interpret and apply applicable departmental or program policies and procedures
- Organize and maintain accurate files and records
- Type accurately at speeds necessary for successful job performance
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments
- Deal tactfully and effectively with persons contacted in the course of work, including those of diverse socioeconomic and cultural backgrounds
- Maintain client/patient confidentiality
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed

- Effectively use computer systems, software applications relevant to work performed and modern business equipment to perform a variety of work tasks
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work
- Understand, respond to and effectively prioritize multiple phone calls and other requests for assistance from the public and County staff, both on the telephone and in person; take detailed messages, resolve requests or complaints in a professional and timely manner
- Compose correspondence and reports independently or from brief instructions; maintain records and databases
- Perform a wide range of specialized administrative tasks in support of assigned center; prepare and type a variety of documents and forms such as correspondence, agendas and reporting using correct punctuation and grammar with accuracy, speed, and minimal supervision
- Learn and understand the organization, services and operation of the County and of outside agencies as necessary to assume assigned responsibilities
- Organize, maintain, and update office database and records systems; with sufficient speed and accuracy to perform the assigned work
- File materials alphabetically, chronologically, and numerically
- Schedule and coordinate projects; set priorities; adapt to changing priorities; meet critical time deadlines
- Use word-processing, databases, spreadsheet, and graphics software applications programs; to maintain accurate records and files and prepare statistical reports
- Follow a planned courier route while adhering to a routine schedule
- Demonstrate responsibility when handling sensitive and confidential documents
- Review and process invoices from vendors for payment; monitor expenditures and accurately process cash transactions; including accurate arithmetic computations
- React calmly and professionally in emergencies, emotional and/or stressful situations
- Maintain significant flexibility in daily operations and decision making, including organizing own work, setting priorities and meeting critical time deadlines
- Work independently and as a team member

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Health Services Assistant I/II: Equivalent to the completion of the twelfth (12th) grade.

Health Services Assistant I: One (1) year of general office experience is preferred. Other combinations of education and experience may be considered.

Health Services Assistant II: Two (2) years of clerical experience in records management, or in a medical office, behavioral or public health program, or community-based organization or higher-level coursework in office or business practices.

License and Special Requirements:

- A valid Class C California driver's license or alternative form of transportation may be required for some positions at the time of appointment. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.
- Current, less than 1 year old, typing certificate.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer and copier; strength stamina, and mobility to perform light to medium physical work including transporting mail, supplies, filing, operating a motor vehicle and visiting various County and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups and over the telephone. Finger dexterity is needed to access, enter, and retrieve data manually as well as using a computer keyboard, typewriter keyboard, or calculator, to set up and file various data and records, and to operate standard office equipment. Positions in this classification occasionally bend, carry, stoop, squat, twist, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to constantly move about on foot and to lift, carry, reach, push, and pull materials and objects, up to 30 pounds, as necessary to perform job functions. On occasion, when performing courier duties, exposure to inclement weather may occur.

WORKING CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and potential exposure to hazardous physical substances. Tasks may require exposure to illness/disease, work related stress and hostile clients. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

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VETERANS' PREFERENCE POLICY / DRUG-FREE WORKPLACE**