



TITLE: SENIOR HEALTH SERVICES ASSISTANT

FLSA: Non-Exempt

BOARD APPROVED:

BARGAINING UNIT: Misc.

DEFINITION

Under supervision, performs lead direction and training to Health Services Assistants; performs a variety of medical office, medical records and/or program support activities for County clinics and behavioral or public health programs, which includes assisting staff and providing guidance related to word processing, data entry and organization, telephone and counter reception, patient scheduling and intake, and maintaining, processing, and filing applications and medical records; may provide guidance related to preparing correspondence and/or reports; provides information and assistance to subordinate staff and the general public; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from assigned supervisory or management staff. Exercises technical and functional direction over and provides training to lower-level staff. Exercises no direct supervision of staff.

CLASS CHARACTERISTICS

This is the advanced journey-level classification in the Health Services Assistant series responsible for performing the most complex work assigned to the series. Incumbents regularly work on tasks which are varied and complex, requiring considerable discretion and independent judgment. Positions in the classification rely on experience and judgement to perform assigned duties. Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver services. Work is typically reviewed upon completion for soundness, appropriateness and conformity to policy and requirements.

EXAMPLES OF ESSENTIAL FUNCTIONS (Illustrative Only)

- Provides lead direction to and reviews work of assigned staff; organizes and assigns work, sets priorities, and follows up to ensure completion of assigned work.
- May assist supervisory staff by providing input into selection decisions, performance evaluations, disciplinary matters, and other personnel decisions.
- Trains and monitors staff in appropriate methods and techniques used for health services and program related activities, including performing complex clerical assignments, coordinating schedules and monitoring workflow; overseeing and

assisting with managing patient scheduling, records management and initiation of process improvement techniques.

- Responds to and provides direction to staff regarding inquiries and requests for information from 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 requests.
- Retrieves and researches medical or mental health charts; runs reports to assist with eligibility determination; completes a variety of forms and documents relating to entries in the medical record; generates and processes legal documents such as birth and death certificates; maintains logs and records.
- 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.
- Provides guidance related to gathering and coding diagnoses, procedures, and operations using health records for statistical indexing using ICD-10 and CPT classification systems; may oversee preparation of statistical reports.
- Ensures patient information is verified; assists staff and collects and assembles patient medical records; obtains discharge records; performs records processing and enters information into proper patient record and information system.
- 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.
- Provides direction regarding review of records and content, accuracy, completeness and compliance with regulatory, legal and organizational requirements; resolves routine errors and completes records processing in accordance with policies and procedures.
- Accepts subpoenas and requests for information from various entities; prepares information timely in accordance with agency statutory requirements; prepares records for court proceedings and provides testimony as to the authenticity of records; attends court proceedings.
- May oversee audits of lower-level staff and ensure quality control of documents; verifies forms and records; identifies and documents inaccuracies in accordance with established criteria; prepares and provides reproductions of records as appropriate; advises healthcare staff and supervisors as needed.
- 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.
- Prepares, scans and indexes documents in online archive system; verifies the accuracy of scanned documents and source documents and ensures documents are legible and properly indexed for accurate retrieval.
- Operates a variety of office equipment such as computer terminals, scanners, copiers, and information and image management systems.

- Provides general information, instruction and assistance to employees and the public; answers questions regarding laws, regulatory requirements, and departmental policies and procedures.
- Provides clerical support oversight including scheduling appointments for medical staff and clients; providing phone support, file management, correspondence and assistance with coordinating routine maintenance of fleet vehicles.
- 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.
- 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:

- Principles of providing functional direction and training
- Clerical practices and procedures
- County and assigned department programs, goals, and policies and procedures
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility
- Basic record keeping principles and practices
- Medical terminology related to health records, release of medical records and information, and medical office support work
- Methods of preparing and processing various records, reports, forms, and other documents particular to assigned department of program
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and County staff
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar

- 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:

- Plan, organize, coordinate the work of assigned staff
- Effectively provide staff leadership and work direction
- 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 patients' 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
- 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:

- Equivalent to completion of the twelfth (12th); and
- Four (4) years of clerical experience in records management, or in a medical office, behavioral or public health program, or community-based organization.

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.

**EQUAL OPPORTUNITY EMPLOYER / AMERICANS WITH DISABILITIES ACT
COMPLIANT / VETERANS' PREFERENCE POLICY / DRUG-FREE WORKPLACE**