

**DUTY STATEMENT**  
DSH3002 (Rev. 01/2020)



*Box reserved for Personnel Section*

	<b>RPA #</b>	<b>Position Control Approval: BL</b>	<b>Date:</b> 07/12/2024
<b>Employee Name</b>	<b>Division</b> Hospital Administration		
<b>Position No / Agency-Unit-Class-Serial</b> 455-521-1139-XXX	<b>Unit</b> Health Information Management Department		
<b>Class Title</b> Office Technician (Typing)	<b>Location</b> Atascadero State Hospital		
<b>Subject to Conflict of Interest</b> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<b>CBID</b> R04	<b>Work Week Group</b> 2	<b>Class Ranges</b> A

**MAJOR TASKS, DUTIES, AND RESPONSIBILITIES**

Performs a variety of general office work. Performs a variety of the most difficult duties and is expected to consistently exercise a high degree of initiative, independence, and originality in performing assigned tasks. Assigned to work as a member of the Health Information Management Department (HIMD) Clerical Support Services Section, and as such, may be assigned to perform any combination of the duties listed below, depending on departmental needs.

30%	<p><b>File Room Services:</b> Organize, maintain, and secure confidential patient records. <b>Retrieve and re-file patient records from all File Room areas</b> (main floor and basement) for patient care, departmental processing, outside reviewers, studies and audits. Communicate effectively and provide information to numerous telephone requests/inquiries (both from within the hospital and outside agencies) as well as in person contacts. Conduct audits of "out-cards" on a timely basis. Assemble and file loose clinical record documents/material into patient records. Research, review, sort, code and distribute all U.S. and inter-hospital mail. Prepare and mail loose filing materials to other state hospitals on patient transfers. Locate and prepare prior charts for Admission Suite for reservations. Assure that medical records, while under the control of the File Room, are stored in secure areas accessible only to authorized personnel, and are safeguarded against loss, damage, defacement, tampering, and unauthorized use. Maintain medical records in terminal digit order by year. <b>Retrieve records (e.g., overflow records, prior records, and State Record Center) when requested for patient care, healthcare operations, as required by law, or to respond to an authorization to release protected health information.</b></p>
30%	<p>When medical records are to be relocated to the State Record Center, communicate, and coordinate this process. <b>Prepare the required documents for the shipment of medical records to the State Record Center and coordinate the movement of such records with other hospital departments and the State Record Center.</b></p> <p>Copy Clerk Services: Provide clerical assistance to the Staff Services Analyst</p>

	<p>responsible for Subpoena Duces Tecum (SDT), Court Orders, and Authorizations for Release of Information. <b>Scan medical records and save to USB drive, disk, and/or external hard drive. Reassemble documents into the same format in which they were received. Print copies and/or burn to DVD-R as required.</b> Verify/stamp photocopied medical record documents prior to packaging. File completed SDT, Court Order, and/or Authorization packets in charts. <b>Maintain medical record confidentiality. Routinely carry/transport medical record binders weighing up to 15 pounds, and climb stairs, in order to retrieve and re-file patient records from all file room areas, including the basement.</b></p> <p><b>Package printed medical records and/or medical record DVD-R's. Mail out prepared packages in a timely manner so as to comply with legal requirements. Maintain tracking data sheet. Must be able to lift and carry a record carton weighing up to 20 pounds.</b></p>
15%	<p>Provide backup for Office Technician ROI and Forms Management including Chart Runner duties as needed. <b>Serve as a coordinator or member on the HIMD Safety Committee, Training Coordinator and Technology Services Account Manager.</b> Other clerical duties as assigned.</p>
15%	<p>Data Entry: Perform a variety of data entry processes into Admission-Discharge-Transfer (ADT) and other data bases.</p>
10%	<p>Procure needed supplies for HIMD from outside vendors following established procurement methods. Inventory, maintain and order all departmental supplies as needed from hospital storeroom and outside vendors.</p>
Other Information	<p><b>Supervision Received:</b> Health Record Technician III</p> <p><b>Supervision Exercised:</b> None</p> <p><b>KNOWLEDGE AND ABILITIES:</b></p> <p>KNOWLEDGE OF: Modern office methods, supplies and equipment; business English and correspondence; principles of effective training.</p> <p>ABILITY TO: Perform difficult clerical work, including ability to spell correctly; use good English; make arithmetical computations; operate various office machines; follow oral and written directions; evaluate situations accurately and take effective action; read and write English at a level required for successful job performance; make clear and</p>

comprehensive reports and keep difficult records; meet and deal tactfully with the public; apply specific laws, rules and office policies and procedures; prepare correspondence independently utilizing a wide knowledge of vocabulary, grammar and spelling; communicate effectively; provide functional guidance.

### **REQUIRED COMPETENCIES**

#### **ANNUAL HEALTH REVIEW**

All employees are required to have an annual health review and TB test or whatever necessary to ascertain that they are free from symptoms indicating the presence of infection and are able to safely perform their essential job functions.

#### **INFECTION CONTROL**

Applies knowledge of correct methods for controlling the spread of pathogens appropriate to job class and assignment.

#### **SAFETY**

Actively supports a safe and hazard free workplace through practice of personal safety vigilance in the identification of safety or security hazards.

#### **CPR**

Maintain current certification as indicated by local facility.

#### **THERAPEUTIC STRATEGIES AND INTERVENTIONS**

Applies and demonstrates knowledge of correct methods in the management of assaultive behavior as taught in Therapeutic Strategies and Interventions (TSI).

#### **DIVERSITY, EQUITY, AND INCLUSION**

Demonstrates awareness of cultural humility in the workplace to promote fair treatment among fellow staff and patients.

#### **PRIVACY AND SECURITY OF PROTECTED HEALTH INFORMATION**

Maintain and safeguard the privacy and security of patient's protected health information (PHI) and other individually identifiable health information (IIHI) whether it is in paper, electronic, or verbal form in compliance with HIPPA and all other applicable privacy laws.

#### **THERAPEUTIC RELATIONSHIPS / RELATIONSHIP SECURITY**

Demonstrate professional interactions with patients and maintains therapeutic boundaries. Maintains relationship security in the work area; takes effective action and monitors, per policy, any suspected employee/patient boundary violations.

### **SITE SPECIFIC COMPETENCIES**

Knowledge of the contents and organization of the Clinical, Overflow, prior and Reserve Records. Experience in operation and maintenance of various office equipment including photocopy machines, facsimile, and printer. Effectively

communicate with ASH employees, HIMD coworkers, outside evaluators and law enforcement agencies.

**TECHNICAL COMPETENCIES**  
 Knowledge of Admission-Discharge-Transfer (ADT) computer system and Personal Computer for data entry. Knowledge of record filing system.

**LICENSE OR CERTIFICATION**  
 N/A

**TRAINING CATEGORY - 4**  
 The employee is required to keep current with the completion of all required training.

**PHYSICAL DEMANDS – See attached.**

**WORKING CONDITIONS:**  
 Report to work on time and follow procedures for reporting absences. Maintain a professional appearance. Appropriately maintain cooperative, professional, and effective interactions with employees, individuals, and the public.  
 The employee is required to work any shift and schedule in a variety of settings throughout the hospital and may be required to work overtime and float to other work locations as determined by the operational needs of the hospital.

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the Office of Human Rights).

\_\_\_\_\_

Employee Signature \_\_\_\_\_  
 Date

I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.

\_\_\_\_\_

Supervisor’s Signature \_\_\_\_\_  
 Date

\_\_\_\_\_

Reviewing Supervisor’s Signature \_\_\_\_\_  
 Date

**Physical Requirements of Position  
Office Technician (Typing) (1139)  
HIMD File Room Copy Clerk**

Activity	Never/Rarely < 5 min.	Infrequently 5-30 min.	Occasionally 31 min.-2.5 hrs.	Frequently 2.5-5.0 hrs.	Constantly > 5 hrs.	Comments
Interacting/communicating: Face-to-face with public	X					
By phone with public		X				
With inmates, patients, or clients	X					
With co-workers				X		
Supervising staff	X					
Lifting/Carrying						
0 - 10 lbs.				X		
11 - 25 lbs.			X			
26 - 50 lbs.	X					
51 - 75 lbs.	X					
76 - 100 lbs.	X					
100 + lbs.	X					
Sitting			X			
Standing			X			
Walking			X			
Running	X					
Crawling	X					
Kneeling		X				
Climbing			X (Stairs)			
Squatting		X				
Bending (neck)			X			
Bending (waist)			X			
Twisting (neck)			X			
Twisting (waist)			X			
Reaching (above shoulder)			X			
Reaching (below shoulder)			X			
Pushing & Pulling			X			
Power Grasping		X				
Handling (holding, light grasping)				X		
Fine fingering (pinching, picking)			X			
Computer use (keyboard, mouse)				X		
Walking on uneven ground		X				
Driving		X				
Operating hazardous machinery	X					
Exposure to excessive noise	X					
Exposure to extreme temp.	X					
Exposure to dust, gas, fumes, or chemicals	X					
Working at heights	X					