

**DEPARTMENT OF DEVELOPMENTAL SERVICES  
SOUTHERN CALIFORNIA FACILITY  
CANYON SPRINGS  
DUTY STATEMENT**

EMPLOYEE'S NAME:

CLASSIFICATION: Health Record Technician II, Specialist

GENERAL STATEMENT OF DUTIES: Under the general supervision of the Standards Compliance Coordinator, the Health Record Technician II, Specialist, is responsible for carrying out the various health information/records functions/procedures in the facility to maintain confidentiality and security of records. Incumbents are responsible for ensuring clinical record documents (paper and/or automated) are filed accurately and timely, and to maintain the clinical records to meet regulatory requirements. Incumbent works with structured records and procedures to complete assignments, following facility and Department of Developmental Services' policies and procedures and complying with the various regulatory standards. Adheres to policies on operation and security of automated data systems. Responsible for reviewing, and updating as needed, assigned procedures at least annually.

SUPERVISION RECEIVED: Reports to the Standards Compliance Coordinator.

SUPERVISION EXERCISED: None. May act as lead to seasonal or temporary staff or volunteers.

TYPICAL WORKING CONDITIONS: Ongoing interaction with clients; potential exposure to communicable diseases, blood-borne pathogens, medicinal preparations and other conditions common to a clinical nursing environment. Requires meeting specified time frames for work completion. May require working irregular hours.

TYPICAL PHYSICAL DEMANDS: Must possess and maintain sufficient strength, agility, endurance and sensory ability to perform the duties specified in this duty statement.

Vision to read clinical record documentation; policies and procedures; reference material; computer screens, reports and instructions.

Hearing to communicate and interact effectively with others on the telephone or face-to-face.

Ability to operate various types of office equipment which includes, computers, digitalized equipment, photocopying equipment, typewriters, calculators, and other machines, which involve repetitive motions of hands, wrists and arms.

Ability to reach above, at and below shoulder level, and to stretch and bend, pull or push, to retrieve records (up to 10 pounds each) from shelving units, including repetitive movements of hands, wrists and arms.

Ability to transport multiple clinical records (up to 10 pounds each) to various locations within the facility.

Hand and finger dexterity to fasten and unfasten record prongs when filing documentation.

Ability to stand one or two hours to carry out tasks.

Ability to travel, attend training and conferences, etc., at other developmental centers, the community, and or headquarters in Sacramento.

**ESSENTIAL FUNCTIONS (this list may not include all required duties):**

25% Files clinical record documents, after verifying documents are complete. Maintains the paper clinical records in good repair (repair/replace record covers, broken prongs, etc.). Thins/purges active records, and interfiles purged material for storage in the Clinical Record Department. Completes process for preparing records for new admissions.

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**DUTY STATEMENT (Page 2)**

CLASSIFICATION: Health Record Technician II, Specialist

EMPLOYEE'S NAME:

- 25% Inputs client/patient data into various automated systems: admission data; discharge data; client movements; legal class changes; correspondence information; diagnoses; and other demographic information as needed. Prints outs and files updated reports subsequent to such data entry (daily census, treatment profiles, correspondence record sheet, etc.).
- 25% Develops, updates, and conducts preset standard qualitative and quantitative audits of paper/manual and/or automated records to assure the documentation meets requirements. Reviews records for fee for service compliance following specified guidelines and procedures. Prepares reports of findings and recommendations.
- 5% Prepares packets of client/patient information to accompany clients on medical appointments, following HIPAA and other regulatory requirements. Prepares packets for client/patient information for pre-placement activities, provisional placements, transfers, and/or direct discharges. Follows procedures for release of information in response to requests from conservators, courts, family members, other state agencies, and any other requestors. Communicates verbally and/or in writing to persons making requests regarding needed clarifications, explanations for delays in response, etc. Prepares cover letters to accompany released information.
- 5% Inputs and updates accurate data in the "Event Due" electronic log, tracking Interdisciplinary Team meetings, expiration of conservatorships and/or court orders, and other events involved in client care and treatment.
- 5% Types, copies and distributes invitation letters regarding upcoming Interdisciplinary Team meetings.
- 5% Prepares records to be reviewed by licensing/certification surveyors, committee members, consultants, or other reviewers as required; ensures records are retrieved from and returned to the residence after meetings/record reviews.
- 5% Follow-up with program personnel and physicians regarding documentation requirements and audit findings. Communicate audit findings and recommendations effectively. Determines and documents accurate codes for diagnostic client/patient information. Contacts physician, psychiatrist or other health care provider as needed to obtain clarifying information as needed to determine accurate diagnostic codes. Completes procedures for reconciling information on computer generated monthly physician orders sheets, ensuring orders reflect changes made during the prior month (discontinued orders have been deleted, new orders are included). Provides training to staff and/or consultants on clinical record documentation principles, release of information, clinical record formats, and other clinical record related procedures. Prepares training outlines, handouts, and other information needed for effective training.

DRUG/ALCOHOL PRE-EMPLOYMENT TESTING REQUIREMENTS: Not applicable

MINIMUM QUALIFICATIONS: See State Personnel Board's classification specifications.

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Employee's Signature

Date

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Supervisor's Signature

Date

(Revised December 2023-AM)