

MEDICAL OFFICE SUPERVISOR

(proposed new classification)

DEFINITION

Under supervision, plans, organizes, and supervises the activities and operations of health care offices; serves as the Custodian of Records by coordinating medical records program and responding to subpoenas and records requests; develops, implements, evaluates, and ensures quality control of medical records and compliance with applicable policies, procedures, and regulations; selects, trains, and supervises subordinate clerical staff; and attends professional group meetings to collaborate with other divisions, departments, and community agencies on best practices.

DISTINGUISHING CHARACTERISTICS

This single position supervisory classification resides within the Health and Human Services Agency (HHS) and reports to a manager or higher level position. The Medical Office Supervisor class performs difficult, specialized, and sensitive technical administrative work requiring the application of technical knowledge related to the management of health care offices and records. The incumbent is expected to demonstrate considerable independence in coordinating medical records activities and ensure proper retention and preservation methods adhere to established policies, procedures, laws, and regulations.

ESSENTIAL FUNCTIONS

Duties may include, but are not limited to, the following:

- Plans, organizes, and supervises the activities and operations of health care offices by ensuring sufficient staffing for patient reception and registration functions; responding timely to inquiries; maintaining accurate records; establishing policies and procedures that align with applicable laws and regulations; and analyzing challenges and recommending process improvement strategies.
- Works with various staff, contracted providers, and partners to explain medical record procedures and resolve problems; provides training in required processes and procedures.
- Serves as a resource for and advises managers, staff, patients, and other employees and stakeholders; assists in the evaluation of office/business procedures and manuals; and recommends improvements to work operations and recordkeeping systems.
- As an authorized agent or Custodian of Records for HHS, performs, oversees, and ensures standardized practices and maintenance of confidential medical charts by timely filing, retrieving, storing/archiving, processing, adjusting, and reviewing documents, records, and forms for accuracy, completeness, and conformance to applicable rules and regulations.
- Monitors medical records and provides tracking for quality assurance and utilization review; receives subpoenas and records requests and processes the releases of medical records.

- Effectively communicates with other medical practitioners, pharmacies, insurance firms, county, state, and federal agencies pertaining to patient information within confidentiality laws and regulations.
- Attends and participates in professional group meetings; develops effective working relationships with community groups; identifies opportunities for improving service delivery methods and procedures; submits requests for approval for improvements.
- Assists staff with chart and patient inquiries; pulls records for medication service needs.
- Plans, organizes, prioritizes, assigns, supervises, trains, reviews, and participates in the work of staff performing a variety of clerical and administrative duties of assigned program functions; reviews and approves work schedules and time off requests; interviews and recommends hiring; and evaluates the performance of assigned staff and initiates appropriate disciplinary action as necessary.
- Prepares and develops written procedures, memoranda, reports, and forms requiring independent assembly of information and independent judgment and interpretation.
- Keeps current on federal and state laws, regulations, policies, and procedures that govern medical records and health services to effectively respond to unusual complaints, inquiries, or situations and deliver patient services.
- Performs other related duties as assigned.

EMPLOYMENT STANDARDS

Education: High school diploma or GED; AND

Experience: Three (3) years of experience working with the public and performing increasingly responsible clerical duties in healthcare setting, including managing and processing records requests and one (1) year performing lead work or supervisory duties.

License This classification may require incumbent to possess and maintain a valid California driver's license, Class C or higher, to carry out job related duties. Individual who does not meet this requirement due to a physical or mental disability may request a reasonable accommodation.

Certification: Typing certificate of at least 35 net words per minute within (twelve) 12 months at time of application is required. Certification as an Accredited Records Technician (ART) with the American Health Information Management Association (AHIMA) is desirable.

KNOWLEDGE & ABILITY

Knowledge of:

- Basic principles and practices of medical recordkeeping and filing methods
- Proper classification, maintenance, release, and custody of medical case records or information

- Federal, state, and local laws, rules, codes, policies, procedures, and regulations relating to medical record and client confidentiality
- Modern office equipment, methods, practices, and procedures, including receptionist and telephone techniques, letter and report writing, and the use of computers and applicable software such as word processing, spreadsheets, databases, and other specialized applications use in hospital and/or clinical settings
- Proper use of the English language including spelling, vocabulary, grammar, and punctuation
- Principles and practices of supervision, discipline, leadership, mentoring, and training

Ability to:

- Learn generally accepted theories, concepts, and techniques of behavioral health and/or social services programming
- Independently develop and implement reporting and tracking systems; prioritize work, and coordinate activities to meet critical deadlines
- Assemble, monitor, standardize, and evaluate the filing and retention of medical records across one or more health care locations; clearly analyze and summarize data and situations to adopt an effective course of action
- Write reports and procedures relating to medical record retention and release; communicate clearly and concisely, both orally and in writing
- Interpret, analyze, explain, and apply federal, state, and local policies, codes, laws, rules, and regulations relating to the retention and release of medical information; exercise discretion and maintain confidentiality of information
- Establish and maintain cooperative, effective working relationships with others, including being sensitive to social, economic, and cultural differences of patients and their families
- Deal tactfully, effectively, and professionally on medical release issues, including times when the party seeking release is insistent, hostile, or irate
- Apply customer service skills, including the identification of patients/stakeholders' needs and utilization of available resources to ensure commitments are met
- Plan, coordinate, assign, supervise, and evaluate the work of others; establish and implement effective employee development and training programs that align with unit, department, and organizational goals

ENVIRONMENTAL & FUNCTIONAL FACTORS

Incumbent in this class generally perform work in an office and/or remote work settings, alone or closely with others. The incumbent is required to communicate verbally with coworkers, clients, and other stakeholders in person, via electronic means, and on the phone, and occasionally responds to stressful situations in a calm, professional manner. The incumbent is also required to travel independently to various meeting sites and offices throughout the County and may be required to work irregular hours, off-shifts (nights and weekends), and holidays.

MEDICAL CLASS

This class requires light physical effort, which may include frequent lifting, pushing, pulling, or carrying objects up to ten (10) pounds and occasional lifting objects up to twenty-five (25) pounds. The incumbent performs mostly sedentary office work and may sit for extended periods of time and may require the ability to place or retrieve items at below waist level while standing, bending, stooping, and/or squatting. Considerable moving about may also be involved. Additionally, the incumbent requires manual dexterity, visual acuity, color and depth perception, good hearing, and eye-hand coordination to use a variety of office equipment, transcribe observations, prepare reports, and read documents.

CLASS HISTORY

Established Date: TBD

Revision Date: