## Contents

<table>
<thead>
<tr>
<th>Profile Title</th>
<th>AFC Banding</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clerical Officer/Receptionist</td>
<td>Band 2</td>
<td>3</td>
</tr>
<tr>
<td>Secretary/Medical Secretary/Admin Team Leader/Receptionist Higher Level (GP Practice)</td>
<td>Band 3</td>
<td>6</td>
</tr>
<tr>
<td>Secretary Higher Level/Medical Secretary Higher Level/Admin Team Coordinator</td>
<td>Band 4</td>
<td>9</td>
</tr>
</tbody>
</table>
Band 2 source profiles

Office Services
Clerical Officer (text processing)

Patient Services
Clerical Officer (admissions)
Clerical Officer (reception)
Clerical Officer (wards)
Receptionist A&E
Health Records Assistant (higher level)

We have omitted Clinical Coding Officer (entry level) and Clerical Officer (data entry) since they are not strictly speaking clerical or secretarial jobs.

We have omitted Secretary (entry level), since it has a KTE of 3.
## Profile Label:
**Clerical Officer/Receptionist**

## Job Statement
1. Provides clerical support/reception service
2. Answers general queries
3. Carries out administrative tasks

## Factor: Communication & relationship skills
**Relevant Job Information:**
- Provide and receive routine information, to inform work colleagues, patients, clients / Provide and receive routine information requiring tact or persuasive skills, barriers to understanding
- Dealing with telephone queries, checking clerical, patient information with clerical staff and patients / Communicating information verbally and in writing, routine information with patients and staff on, for example discharge, admission, transfer. May be barriers to understanding for example anxious patients, cultural differences, language or communication difficulties

## Factor: Knowledge, training & experience
**Relevant Job Information:**
- Range of routine work procedures requiring job training
- Knowledge of administrative systems, admission, patient information systems, hospital departments, clerical / office procedures, data input procedures acquired through on-the-job training

## Factor: Analytical & judgemental skills
**Relevant Job Information:**
- Judgements involving facts or situations, some requiring analysis
- Resolves problems, eg locating notes, appointment issues, accuracy, ward issues when responding to queries, escalating issues when necessary

## Factor: Planning & organisational skills
**Relevant Job Information:**
- Organise own day to day work tasks or activities / Plan and organise straightforward activities, some ongoing
- Organises own workload / Organises eg patient transport, discharge, appointments, admissions

## Factor: Physical skills
**Relevant Job Information:**
- Physical skills obtained through practice / Developed physical skills: advanced keyboard use
- Standard keyboard skills, manoeuvring notes trollies / Entering patient / client data into computer

## Factor: Responsibility for patient / client care
**Relevant Job Information:**
- Assist patients / clients during incidental contacts / Provide non-clinical advice, information to patients / clients / relatives
- Incidental contact / Provides non-clinical information or advice to patients or relatives

## Factor: Responsibility for policy / service development
**Relevant Job Information:**
- Follow policies in own role, may be required to comment / Implement policies and propose changes to practices, procedures for own area
- Follows departmental procedures and policies

## Factor: Responsibility for financial & physical resources
**Relevant Job Information:**
- Personal duty of care in relation to equipment, resources / handle cash, valuables / Maintain stock control
- Careful use of office equipment / Handles patient valuables or petty cash; orders/maintains supplies or stock

## Factor: Responsibility for Human Resources
**Relevant Job Information:**
- Demonstrate own activities to new or less experienced employees
- Demonstrates activities to new starters

## Factor: Responsibility for Information Resources
**Relevant Job Information:**
- Data entry, text processing, storage of data
- Processes or transcribe data, patient records

## Factor: Responsibility for Research & Development
**Relevant Job Information:**
- Undertake surveys or audits, as necessary to own work
- Completes staff surveys and audits

## Factor: Freedom to Act
**Relevant Job Information:**
- Standard operating procedures, someone available for reference
- Uses initiative within standard operating procedures, advice available

**JE Level** | **Score**
--- | ---
2-3a | 12-21
2 | 36
2 | 15
1-2 | 6-15
2-3 | 15-27
1-2 | 4-9
1 | 5
1-2ac | 5-12
1 | 5
2a | 9
1 | 5
2 | 12
<table>
<thead>
<tr>
<th>Factor</th>
<th>Relevant Job Information</th>
<th>JE Level</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>13. Physical Effort</td>
<td><strong>Combination of sitting, standing, walking/ Frequent sitting or standing in a restricted position; Frequent light effort for several short periods; Occasional light effort for several long periods; Occasional moderate effort for several short periods</strong>&lt;br&gt;Light physical effort/ at keyboard for long periods; lifting, sorting, filing, general handling of records; pushing trolleys with case notes</td>
<td>1-2abcd</td>
<td>3-7</td>
</tr>
<tr>
<td>14. Mental Effort</td>
<td><strong>Frequent concentration; work pattern predictable</strong>&lt;br&gt;Concentration for eg preparing notes, filing, taking and accessing patient details, answering queries, processing data and records</td>
<td>2a</td>
<td>7</td>
</tr>
<tr>
<td>15. Emotional Effort</td>
<td><strong>Exposure to distressing or emotional circumstances is rare/ Occasional/ Frequent distressing or emotional circumstances</strong>&lt;br&gt;Interacting with terminally ill patients</td>
<td>1a-2a-3a</td>
<td>5-11-18</td>
</tr>
<tr>
<td>16. Working Conditions</td>
<td><strong>Exposure to unpleasant conditions is rare/ Occasional unpleasant conditions; Use VDU equipment more or less continuously/ Frequent unpleasant conditions; Occasional highly unpleasant conditions</strong>&lt;br&gt;Office or similar conditions/ dust, smells, verbal aggression; use of computer for long periods/ frequent noise, verbal and physical aggression; occasional exposure to body fluids, eg vomit, phlegm</td>
<td>1-2ae-3ab</td>
<td>3-7-12</td>
</tr>
</tbody>
</table>
Band 3 source profiles

**Office Services**
- Medical Secretary
- Secretary

**Patient Services**
- Clerical Officer Team Leader (Outpatients)
- Health Records Officer/Team Leader
- Receptionist Higher Level (General Practice)

We have omitted Clinical Coding Officer as its job purpose and role descriptors did not align with the other profiles.
<table>
<thead>
<tr>
<th>Factor</th>
<th>Relevant Job Information</th>
<th>JE Level</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Communication &amp; Relationship Skills</td>
<td>Provide and receive routine information requiring tact or persuasive skills, barriers to understanding; Provide and receive complex or sensitive information</td>
<td>3ab</td>
<td>21</td>
</tr>
<tr>
<td>2. Knowledge, Training &amp; Experience</td>
<td>Range of work procedures and practices; base level of theoretical knowledge</td>
<td>3</td>
<td>60</td>
</tr>
<tr>
<td>3. Analytical &amp; Judgemental Skills</td>
<td>Judgements involving facts or situations, some requiring analysis</td>
<td>2</td>
<td>15</td>
</tr>
<tr>
<td>4. Planning &amp; Organisational Skills</td>
<td>Plan and organise straightforward activities, some ongoing</td>
<td>2</td>
<td>15</td>
</tr>
<tr>
<td>5. Physical Skills</td>
<td>Physical skills obtained through practice / Developed physical skills: advanced keyboard use</td>
<td>2-3a</td>
<td>15-27</td>
</tr>
<tr>
<td>6. Responsibility for Patient/Client Care</td>
<td>Assist patients / clients during incidental contacts / Provide non-clinical advice, information to patients / clients / relatives</td>
<td>1-2</td>
<td>4-9</td>
</tr>
<tr>
<td>7. Responsibility for Policy/Service Development</td>
<td>Follow policies in own role, may be required to comment / Implement policies and propose changes to practices, procedures for own area</td>
<td>1-2</td>
<td>5-12</td>
</tr>
<tr>
<td>8. Responsibility for Financial &amp; Physical Resources</td>
<td>Handle cash, valuables; Safe use of equipment other than equipment used personally; Maintain stock control; Authorised signatory, small payments</td>
<td>2abcd</td>
<td>12</td>
</tr>
<tr>
<td>9. Responsibility for Human Resources</td>
<td>Demonstrate own activities to new or less experienced employees/ Day to day co-ordination of staff; Provide training in own discipline</td>
<td>1-2ac</td>
<td>5-12</td>
</tr>
<tr>
<td>10. Responsibility for Information Resources</td>
<td>Data entry, text processing, storage of data / Take, transcribe formal minutes; Responsible for maintaining one or more information systems, significant job responsibility</td>
<td>2a-3ac</td>
<td>9-16</td>
</tr>
<tr>
<td>11. Responsibility for Research &amp; Development</td>
<td>Undertake surveys or audits, as necessary to own work</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>12. Freedom to Act</td>
<td>Standard operating procedures, someone available for reference/ Clearly defined occupational policies, work is managed, rather than supervised</td>
<td>2-3</td>
<td>12-21</td>
</tr>
<tr>
<td>Factor</td>
<td>Relevant Job Information</td>
<td>JE Level</td>
<td>Score</td>
</tr>
<tr>
<td>------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------</td>
<td>--------</td>
</tr>
<tr>
<td>13. Physical Effort</td>
<td>Combination of sitting, standing, walking/ Frequent sitting or standing in a restricted position; Frequent light effort for several short periods; Occasional light effort for several long periods; Occasional moderate effort for several short periods/ Frequent light effort for several long periods; Frequent moderate effort for several short periods Light physical effort/Keyboard work for long periods; lifting case notes; pushing notes trolleys; moving equipment</td>
<td>1-2abcd 3</td>
<td>3-7-12</td>
</tr>
<tr>
<td>14. Mental Effort</td>
<td>Frequent concentration; work pattern predictable/ Unpredictable Concentration for administrative and secretarial duties, work pattern predictable/Interruptions from medical staff, external agencies</td>
<td>2a-3a</td>
<td>7-12</td>
</tr>
<tr>
<td>15. Emotional Effort</td>
<td>Exposure to distressing or emotional circumstances is rare/ Occasional/ Frequent distressing or emotional circumstances Limited exposure to distressing or emotional circumstances/Occasional contact with distressed patients or relatives, indirect exposure to distressing circumstances by typing letters and reports/Contact with terminally ill patients</td>
<td>1-2a-3a</td>
<td>5-11-18</td>
</tr>
<tr>
<td>16. Working Conditions</td>
<td>Exposure to unpleasant conditions is rare/ Occasional unpleasant conditions; Use VDU equipment more or less continuously Office or similar conditions/Dusty conditions in storage areas, VDU use, Body smells</td>
<td>1-2ae</td>
<td>3-7</td>
</tr>
<tr>
<td>JE Score/Band</td>
<td>(Band 3 range: 216-270)</td>
<td></td>
<td>196 – 274</td>
</tr>
</tbody>
</table>
Band 4 source profiles

Office Services

Secretary Higher Level
Medical Secretary Higher Level
Legal Secretary

Patient Services

MDT Co-ordinator
Health Records Officer Higher Level/Team Leader

We have excluded the General Office Manager/Admin Team Leader published profile as its ranges were so different from the others.
## Profile Label: Secretary Higher Level/Medical Secretary Higher Level/Admin Team Coordinator

### Job Statement:
1. Provides secretarial/administrative support to an area or team
2. Liaises with own and other departments as appropriate
3. May provide training/supervision

<table>
<thead>
<tr>
<th>Factor</th>
<th>Relevant Job Information</th>
<th>JE Level</th>
<th>Score</th>
</tr>
</thead>
</table>
| 1. Communication & Relationship Skills | Provide and receive routine information requiring tact or persuasive skills, barriers to understanding; Provide and receive complex or sensitive information; Provide advice, instruction or training to groups/ Provide and receive complex, sensitive information; barriers to understanding  
Exchange information with patients, relatives and staff on a variety of departmental matters and procedures, anxious patients and relatives, cultural or language difficulties/communicates complicated administrative information to staff from other departments, external contacts; induction of new staff, maintains working relationships with own and other departments, trains and motivates staff to achieve objectives/ Communicates complex, sensitive, contentious information with a range of stakeholders, where persuasion or negotiation is required | 3abc-4a  | 21-32 |
| 2. Knowledge, Training & Experience | Range of work procedures and practices, majority non-routine; intermediate level theoretical knowledge  
Knowledge of secretarial and administrative procedures and systems, the majority of which are non-routine, acquired through training and experience to Vocational Level 3 or equivalent; plus knowledge of specialist functional/medical/legal terms, organisational policies and procedures and knowledge and experience to deal with non-routine issues such as problem solving for an area of work or developing alternative or additional procedures | 4        | 88    |
| 3. Analytical & Judgemental Skills | Judgements involving facts or situations, some requiring analysis/ Range of facts or situations requiring analysis  
Exercises judgement when dealing with enquiries. Analyses information to resolve problems for patients, carers and staff, eg on appointments, diary commitments | 2        | 15    |
| 4. Planning & Organisational Skills | Plan and organise straightforward activities, some ongoing/ Plan and organise complex activities or programmes, requiring formulation, adjustment  
Plans staff rotas and cover; schedules clinics; arranges meetings; manages diaries/ Organises events, conferences, MDT meetings. | 2-3      | 15-27 |
| 5. Physical Skills | Physical skills obtained through practice/ Developed physical skills: advanced keyboard use  
Keyboards skills for regular use of computer systems/Touch or audio typing | 2-3a     | 15-27 |
| 6. Responsibility for Patient/Client Care | Assist patients /clients during incidental contacts/ Provide non-clinical advice, information to patients/clients/relatives  
Incidental contact with patients/provides advice, information and guidance to patients, carers and relatives about appointments, clinics, admissions | 1-2      | 4-9    |
| 7. Responsibility for Policy/Service Development | Follow policies in own role, may be required to comment/ Implement policies and propose changes to practices, procedures for own area  
Follows existing policies and procedures; may comment on proposals/Implements policies and procedures in own area, proposes changes to policies and procedures in own area. | 1-2      | 5-12   |
| 8. Responsibility for Financial & Physical Resources | Personal duty of care in relation to equipment, resources/ Handle cash, valuables; Safe use of equipment other than equipment used personally;  
Maintain stock control; Authorised signatory, small payments; Safe use of highly complex equipment  
Responsibility for petty cash, office equipment; orders and maintains office supplies and stationery; signs time sheets | 2abcd    | 12     |
| 9. Responsibility for Human Resources | Demonstrate own activities to new or less experienced employees/ Day to day co-ordination of staff; Professional /clinical supervision; Provide training in own discipline  
Demonstrates administrative, secretarial duties to new starters, less experienced staff/ Provides day to day supervision and coordination of staff; trains own staff on departmental procedures and policies | 1-2ac    | 5-12   |
<p>| 10. Responsibility for Information Resources | Data entry, text processing, storage of data; Occasional requirement to develop or create reports, documents, drawings/ Take, transcribe formal minutes; Regular requirement to develop or create reports, documents, drawings; Responsible for maintaining one or more information systems, significant job responsibility | 2ab-3abc | 9-16   |</p>
<table>
<thead>
<tr>
<th>Factor</th>
<th>Relevant Job Information</th>
<th>JE Level</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Updates, maintains, stores clinical or non-clinical records, appointment details/ Takes, transcribes formal minutes; creates databases to collect and monitor information; maintains and updates databases, regular requirement to develop or create reports and documents</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11.</td>
<td>Responsibility for Research &amp; Development</td>
<td>Undertake surveys or audits, as necessary to own work Complete staff surveys</td>
<td>1</td>
</tr>
<tr>
<td>12.</td>
<td>Freedom to Act</td>
<td>Clearly defined occupational policies, work is managed, rather than supervised Works independently to defined policies and procedures, manages own workload</td>
<td>3</td>
</tr>
<tr>
<td>13.</td>
<td>Physical Effort</td>
<td>Combination of sitting, standing, walking/ Frequent sitting or standing in a restricted position; Frequent light effort for several short periods; Occasional light effort for several long periods; Occasional moderate effort for several short periods/ Occasional moderate effort for several long periods; Frequent moderate effort for several short periods Light physical effort/ Keyboard work for long periods; lifting case notes; pushing notes trolleys; moving equipment</td>
<td>1-2abcd</td>
</tr>
<tr>
<td>14.</td>
<td>Mental Effort</td>
<td>Frequent concentration; work pattern predictable/ Unpredictable Concentration for administrative and secretarial duties, work pattern predictable/ Interruptions from medical staff, external agencies</td>
<td>2a-3a</td>
</tr>
<tr>
<td>15.</td>
<td>Emotional Effort</td>
<td>Exposure to distressing or emotional circumstances is rare/ Frequent indirect distressing or emotional circumstances Limited exposure to distressing or emotional circumstances/ Type documents of a distressing nature, may deal with distressed patients or bereaved relatives. Deals with staffing issues</td>
<td>1-2b</td>
</tr>
<tr>
<td>16.</td>
<td>Working Conditions</td>
<td>Exposure to unpleasant conditions is rare/ Occasional unpleasant conditions; Use VDU equipment more or less continuously Office or similar conditions/ Dusty conditions in storage areas, VDU use, body smells</td>
<td>1-2ae</td>
</tr>
</tbody>
</table>

JE Score/Band (Band 4 range: 271 – 325) 233* - 318

*Generic profiles – the band for jobs covered by this generic profile is band 4. The minimum total profile score falls below the band 4 grade boundary. This is the result of using a single generic profile to cover a number of jobs of equivalent but not necessarily similar factor demand. It is not anticipated that any job will be assessed at the minimum level of every possible factor range. If this were the case, it indicates that the job should instead be matched against a band 3 profile. If this is not successful, the job must be locally evaluated. (JE handbook, chapter 9, paragraph 5.2)
Band 5

Office Services

Personal Assistant

Patient Services

Practice Manager (Small Practice)
Health Records Section Manager/Assistant Health Records Manager (Multi Section Unit)

It was not possible to combine these profiles successfully due to their diverse nature, so the published profiles will stand.
Band 6

Patient Services

Level 5 KTE
Practice Manager (Group Practice)

Level 6 KTE
Health Records Multi Section Manager
Voluntary Services Manager

It was not possible to combine these profiles successfully due to their diverse nature, so the published profiles will stand.
Band 7

Patient Services

Clinical Coding Services Manager
Health Records Department Manager

Cannot combine these profiles, as their KTE is different
Band 8

Office Services
Solicitor Consultant (8b-c)

Patient Services
Health Records Service Manager (8a-c)

Cannot combine these, as their KTE is different