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The following profiles were archived in July 2019, as they have been incorporated into the generic Secretarial and Clerical group:

CO (Admissions)	band 2
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CO (Wards)	band 2
Receptionist (A&E)	band 2
CO Team Leader (Outpatients)	band 3
Receptionist Higher Level (GP)	band 3
MDT Co-ordinator	band 4

* New in January 2007

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Profile Label: Clerical Officer (Data Entry)
Job Statement: 1. Enters patient/client records in to patient information systems.
 2. Generates standard reports.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive routine information, to inform work colleagues, patients, clients. Checks with clerical and administrative staff the accuracy of patient information.	2
2. Knowledge, Training & Experience	Range of routine work procedures requiring job training. Knowledge of data coding and input procedures acquired through job training.	2
3. Analytical & Judgemental Skills	Judgements involving facts or situations, some requiring analysis. Solves problems relating to patient records, checks for accuracy.	2
4. Planning & Organisational Skills	Organise own day to day work tasks or activities. Prioritises own work.	1
5. Physical Skills	Physical skills obtained through practice / Developed physical skills; advanced keyboard use. Input patient/client information into computer.	2-3(a)
6. Responsibility for Patient/Client Care	Assist patients/clients during incidental contacts / Provides non-clinical advice, information to patients/clients/relatives. Incidental patient/client contact / provides advice e.g. on appointments.	1-2
7. Responsibility for Policy/Service Development	Follow policies in own role, may be required to comment. Follows departmental policies.	1
8. Responsibility for Financial & Physical Resources	Personal duty of care in relation to equipment, resources. Careful use of office equipment.	1
9. Responsibility Human Resources	Demonstrate own activities to new or less experienced employees. Demonstrates own tasks to new starters.	1
10. Responsibility for Information Resources	Data entry, text processing, storage of data. Process patient / client records; generate standard reports.	2(a)
11. Responsibility for Research & Development	Undertake surveys or audits, as necessary to own work. Completes e.g. staff surveys.	1
12. Freedom to Act	Standard operating procedures, someone available for reference. Works within standard data entry procedures.	2
13. Physical Effort	Frequent sitting or standing in a restricted position. Inputting into computer for a substantial proportion of working time.	2(a)
14. Mental Effort	Frequent requirement for prolonged concentration. Prolonged concentration is required when inputting into computer; need to ensure accuracy.	4(a)
15. Emotional Effort	Occasional indirect exposure to distressing or emotional circumstances. Inputs distressing case notes.	1(b)
16. Working Conditions	Use VDU equipment more or less continuously. Uses computer for most of working day.	2(e)
JE Score/Band	JE Score 166-183	Band 2

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JE Score/Band	JE Score 183–198	Band 2
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Profile Label: Clinical Coding Officer Entry Level

Job Statement: 1. Collect and codify medical information in order to provide data on the Trust's clinical activities.
2. Deal with enquiries.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provides and receives routine information to inform work colleagues. Translate relevant diagnostic and procedural details into alpha-numeric codes.	2
2. Knowledge, Training & Experience	Understanding of a range of routine work procedures. Knowledge of computer use, coding procedures; Base knowledge of anatomical and physiological terms; Formal training through Basic Coders Course.	2
3. Analytical & Judgemental Skills	Judgements made involve facts or situations, some of which require analysis. Use judgement to interpret varied terminology used; Interpret diagnostic and procedural information from case notes; Select most appropriate coding.	2
4. Planning & Organisational Skills	Organise own day to day work tasks or activities.	1
5. Physical Skills	Standard keyboard skills. Input patient information into computer.	2
6. Responsibility for Patient/Client Care	Provides information.	1
7. Responsibility for Policy/Service Development	Follows policies in own role.	1
8. Responsibility for Financial & Physical Resources	Observes personal duty of care when using equipment.	1
9. Responsibility Human Resources	Demonstrate duties to new starters.	1
10. Responsibility for Information Resources	Data entry, text processing or storage of data. Process and codify patients' case notes; test results.	2 (a)
11. Responsibility for Research & Development	Undertakes surveys or audits as are necessary to own work.	1
12. Freedom to Act	Guided by standard operating procedures. Work independently; supervisor is available for advice.	2
13. Physical Effort	Frequent requirement for sitting in a restricted position. Inputting into computer more or less continuously.	2 (a)
14. Mental Effort	Frequent requirement for prolonged concentration. Concentration is required when analysing, making decisions, converting information into codes. Inputting into computer system requires accuracy and constant checking of codes.	4 (a)
15. Emotional Effort	Exposure to distress or emotional circumstances is rare.	1
16. Working Conditions	Use of VDU more or less continuously.	2
JE Score/Band	JE Score 166	Band 2

National profiles for patient services

Profile Label:

Health Records Assistant Higher Level

Job Statement:

1. Initiates, retrieves and files case records, prepare records for admission, outpatient attendances.
2. Sorts and filters out case notes.
3. Responds to routine requests for information.
4. May carry out clinic reception/ward duties.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive routine information, to inform work colleagues, patients, clients/Provide and receive routine information requiring tact or persuasive skills; barriers to understanding. Exchanges information with patients, staff, external agencies for records, appointments, admissions/ Deals with queries from anxious patients, visitors; cultural or language difficulties.	2–3a
2. Knowledge, Training & Experience	Range of routine work procedures requiring job training. Knowledge of range of patient administration system and case notes procedures, acquired through experience and qualification at NVQ Level 2 or Basic Level of Certificate of Technical Competence (IHRIM) and ECDL or equivalent.	2
3. Analytical & Judgemental Skills	Judgements involving facts or situations, some requiring analysis. Investigates and tracks case notes, disclosure of patient information in accordance with current legislation.	2
4. Planning & Organisational Skills	Organise own day to day work tasks or activities/Plan and organise straightforward activities, some ongoing. Workload is allocated, organises own day to day tasks/Planning and organising clinics, appointments.	1–2
5. Physical Skills	Physical skills obtained through practice. Inputs patient information onto the computerised Patient Administration System; Manoeuvres case record trolleys.	2
6. Responsibility for Patient/Client Care	Provide non clinical advice, information to patients/clients/relatives. Provide advice and guidance to patients and relatives on appointments and admissions.	2
7. Responsibility for Policy/Service Development	Follow policies in own role, may be required to comment. Follows departmental procedures and policies.	1
8. Responsibility for Financial & Physical Resources	Personal duty of care in relation to equipment, resources/Handles cash, valuables; Maintains stock control. Careful use of equipment and facilities/Handles patient valuables; orders stock.	1–2ac
9. Responsibility Human Resources	Demonstrate own activities to new or less experienced employees. Demonstrates and explains practices and procedures to new staff.	1
10. Responsibility for Information Resources	Data entry, text processing, storage of data. Processes and stores patient data using a computerised system, files paper data within the case record in retrievable format.	2a
11. Responsibility for Research & Development	Undertake surveys or audits, as necessary to own work. Tests effectiveness of procedures in own work area.	1
12. Freedom to Act	Standard operating procedures, someone available for reference. Deals with enquiries, advice and guidance available from line manager.	2
13. Physical Effort	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. Inputting at keyboard for most of day; Lifting, sorting, filing, general handling of case records; Pushing trolleys with patient notes.	2abcd– 3ac
14. Mental Effort	Frequent concentration; work pattern predictable. Concentration for preparing notes, filing test results.	2a

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15. Emotional Effort	Occasional distressing or emotional circumstances/Frequent distressing or emotional circumstances. Contact with distressed and terminally ill patients.	2a–3a
16. Working Conditions	Exposure to unpleasant conditions is rare/Occasional unpleasant conditions. Office or similar conditions/ dusty conditions in archive storage areas; verbal aggression e.g. patients in A&E Dept.	1–2a
JE Score/Band	JE Score 162–203	Band 2

National profiles for patient services

Profile Label:

Clinical Coding Officer

Job Statement:

1. Abstract, analyse, translate and data enter patient records.
2. Deal with enquiries; liaise with clinicians.
3. Locate and collate missing source material e.g. missing case notes, histology

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive complex information. Communicate complex coding rules to medical, clinical and administrative staff and external agencies.	3(b)
2. Knowledge, Training & Experience	Understanding of a range of work procedures requiring a basic level of theoretical knowledge. Knowledge of computer use, coding procedures and conventions; knowledge of medical terminology, anatomical and physiological terms: acquired through work-based training and experience.	3
3. Analytical & Judgemental Skills	Range of facts or situations requiring analysis. Abstract and analyse patient clinical records; use judgement to translate cases where the procedure undertaken not readily codable, application of clinical coding conventions.	3
4. Planning & Organisational Skills	Organises own day to day work tasks and activities. Cases allocated by manager.	1
5. Physical Skills	Standard keyboard skills. Input patient information into computer.	2
6. Responsibility for Patient/Client Care	Assists patients/clients/relatives during incidental contacts. Contact with patients is incidental e.g. on ward visits.	1
7. Responsibility for Policy/Service Development	Follows policies in own role. Implements agreed local variations to coding rules, comments on proposed changes.	1
8. Responsibility for Financial & Physical Resources	Observe personal duty of care when using equipment. Care of office equipment and machinery.	1
9. Responsibility Human Resources	Demonstrates own duties to less experienced staff. Demonstrates own duties to less experienced coding officers.	1
10. Responsibility for Information Resources	Data entry, text processing or storage of data. Process and codify patients' case notes, test results.	2(a)
11. Responsibility for Research & Development	Undertakes surveys or audits, as necessary to own work. May participate in audits.	1
12. Freedom to Act	Guided by standard occupational procedures. Operate mainly on own initiative, but refers more complex issues to supervisor or manager.	2
13. Physical Effort	Frequent requirement for sitting in a restricted position. Inputting into computer more or less continuously.	2(a)
14. Mental Effort	Frequent requirement for prolonged concentration. Concentration is required when converting information into codes, inputting – requires accuracy and constant checking of codes.	4(a)
15. Emotional Effort	Frequent indirect exposure to distressing or emotional circumstances. Daily indirect exposure to disturbing photographs and case notes about abuse and terminally ill patients.	2
16. Working Conditions	Use of VDU more or less continuously. VDU use for coding.	2(e)
JE Score/Band	JE Score 217	Band 3

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Profile Label:

Health Records Officer/Team Leader

Job Statement:

1. Initiates, retrieves and files case records, prepares records for admission, outpatient attendance.
2. May be responsible for the day to day supervision and induction of staff within a section of the department.
3. May take responsibility for a specific function within the department/ward.
4. May be responsible for managing elective admissions for a speciality.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive routine information requiring tact or persuasive skills. Communicates work procedures within own team and with other departments, induction of new staff; Deals with queries from anxious patients, visitors; cultural or language difficulties.	3a
2. Knowledge, Training & Experience	Range of work procedures and practices; base level of theoretical knowledge. Knowledge of patient administration and other related systems, acquired through training experience to NVQ3 equivalent level or Advanced Level of Certificate of Technical Competence (IHRIM) and ECDL or equivalent.	3
3. Analytical & Judgemental Skills	Judgements involving facts or situations, some requiring analysis. Investigates and tracks case notes, provides advice and guidance to staff on disclosure of information in accordance with current legislation; analysis of waiting list information.	2
4. Planning & Organisational Skills	Plan and organise straightforward activities, some ongoing. Allocates workload to team, rosters staff; prioritises workload for self and junior staff.	2
5. Physical Skills	Physical skills obtained through practice/Developed physical skills; advanced keyboard use. Keyboard skills for regular use of computer systems e.g. Patient Administration System.	2–3a
6. Responsibility for Patient/Client Care	Provide non-clinical advice, information to patients/clients/relatives. Provides advice and guidance to patients and relatives on, e.g. appointments and admissions.	2
7. Responsibility for Policy/Service Development	Implement policies and propose changes to practices, procedures for own area. Proposes changes to working procedures, implements procedures set by others.	2
8. Responsibility for Financial & Physical Resources	Safe use of equipment other than equipment used personally; Maintain stock control; Authorised signatory, small payments. Responsible for office equipment (e.g. microfilm reader); Re-orders office supplies; Signs time sheets.	2bcd
9. Responsibility Human Resources	Demonstrate own activities to new or less experienced employees/ Day to day co-ordination of staff; Provide training in own discipline. Demonstrates, explains practices and procedures to new, less experienced staff/ Allocates work to junior staff, checks work; Trains own staff.	1–2ac
10. Responsibility for Information Resources	Data entry, text processing, storage of data. Processes, transmits and stores patient data using a computerised system, files paper data within the case record in retrievable format.	2a
11. Responsibility for Research & Development	Undertake surveys or audits, as necessary to own work. Tests effectiveness of procedures in own work area.	1
12. Freedom to Act	Standard operating procedures, someone available for reference/Clearly defined occupational policies, work is managed, rather than supervised. Deals with enquiries, advice and guidance available from line manager/Works to defined standards, manager available for reference when required.	2–3
13. Physical Effort	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. Inputting at keyboard for most of day; Lifting, sorting, filing, general handling of case records; Pushing trolleys with patient notes.	2abcd–3ac
14. Mental Effort	Frequent concentration; work pattern predictable. Concentration for preparing notes, filing test results.	2a

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15. Emotional Effort	Occasional distressing or emotional circumstances/Frequent distressing or emotional circumstances. Contact with distressed and terminally ill patients.	2a–3a
16. Working Conditions	Exposure to unpleasant working conditions is rare/Occasional unpleasant conditions. Office or similar conditions/ dusty conditions in archive storage areas; verbal aggression e.g. patients in A&E Dept.	1–2a
JE Score/Band	JE Score 218–262	Band 3

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Profile Label:

Clinical Coding Officer Higher Level

Job Statement:

1. Abstract, analyse, translate and data enter patient records.
2. Deal with enquiries; liaise with senior clinicians and participate in multi-disciplinary meetings.
3. Locate and collate missing source material e.g. missing case notes, histology.
4. Act as mentor to less experienced clinical coding officers.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive complex information. Communicate complex coding rules to medical, clinical and administrative staff and external agencies.	3(b)
2. Knowledge, Training & Experience	Understanding of a range of work procedures requiring an intermediate level of theoretical knowledge. Knowledge of computer use, coding procedures & conventions; knowledge of medical terminology, anatomical and physiological terms; acquired through work-based training, Accredited Clinical Coder qualification or equivalent experience.	4
3. Analytical & Judgemental Skills	Range of complex facts or situations requiring analysis, interpretation. Abstract and analyse complex patient clinical records; use judgement to translate cases where the procedure undertaken not readily codable, application of clinical coding conventions.	4
4. Planning & Organisational Skills	Organises own day to day work tasks and activities. Cases allocated by manager.	1
5. Physical Skills	Standard keyboard skills. Input patient information into computer.	2
6. Responsibility for Patient/Client Care	Assists patients/clients/relatives during incidental contacts. Contact with patients is incidental e.g. on ward visits.	1
7. Responsibility for Policy/Service Development	Follows policies in own role. Implements agreed local variations to coding rules, comments on proposed changes.	1
8. Responsibility for Financial & Physical Resources	Observe personal duty of care when using equipment. Care of office equipment and machinery.	1
9. Responsibility Human Resources	Professional supervision. Acts as mentor for less experienced coding officers.	2(b)
10. Responsibility for Information Resources	Data entry, text processing or storage of data. Process and codify patients' case notes, test results.	2(a)
11. Responsibility for Research & Development	Undertakes surveys or audits as are necessary to own work. May participate in audits.	1
12. Freedom to Act	Clearly defined occupational policies. Operate on own initiative, work is managed rather than supervised.	3
13. Physical Effort	Frequent requirement for sitting in a restricted position. Inputting into computer more or less continuously.	2(a)
14. Mental Effort	Frequent requirement for prolonged concentration. Concentration is required when converting information into codes, inputting – requires accuracy and checking of codes.	4(a)
15. Emotional Effort	Frequent indirect exposure to distressing or emotional circumstances. Daily indirect exposure to disturbing photographs and case notes about abuse and terminally ill patients.	2
16. Working Conditions	Use of VDU more or less continuously. VDU use for coding.	2(e)
JE Score/Band	JE Score 276	Band 4

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Profile Label: Health Records Officer Higher Level / Team Leader

- Job Statement:**
1. Manages the day to day activities of the staff within a section of the department
 2. Ensures the provision of on the job training to staff within the section/function.
 3. Maintains data quality of patient registrations.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive complex or sensitive information; Provide advice, instruction or training to groups. Communicates work procedures, induction of new staff, maintains working relationships with own and other departments, trains and motivates staff to achieve objectives.	3bc
2. Knowledge, Training & Experience	Range of work procedures and practices, majority non-routine; intermediate level theoretical knowledge. Knowledge of patient administration system, outpatients clinics system, ward admission procedures and case notes procedures, knowledge of Human Resource policies and procedures, knowledge acquired through experience and qualification at NVQ Level 4 or the Certificate of the Institute of Health Record & Information Management (IHRIM), ECDL or equivalent knowledge and experience.	4
3. Analytical & Judgemental Skills	Judgements involving facts or situations, some requiring analysis. Locates lost case notes, provides advice and guidance to staff on disclosure of information in accordance with current legislation.	2
4. Planning & Organisational Skills	Plan and organise straightforward activities, some ongoing. Plans allocation of workload to team, rostering of staff to ensure adequate skill mix, basic prioritising of workload for self and others.	2
5. Physical Skills	Physical skills obtained through practice/Developed physical skills; advanced keyboard use. Keyboard skills for regular use of computer systems e.g. Patient Administration System.	2-3a
6. Responsibility for Patient/Client Care	Provide non-clinical advice, information to patients/clients/relatives. Basic Information provided in accordance with current legislation, provide advice and guidance to patients and relatives on non-clinical issues.	2
7. Responsibility for Policy/Service Development	Implement policies and propose changes to practices, procedures for own area. Proposes changes to working practices and procedures (e.g. when planning for impact of new legislation, new systems); Implements procedures set by others.	2
8. Responsibility for Financial & Physical Resources	Safe use of equipment other than equipment used personally; Maintain stock control; Authorised signatory, small payments. Responsible for office equipment (e.g. microfilm reader); Re-orders office supplies; Signs time sheets.	2bcd
9. Responsibility Human Resources	Day to day management; Teach/deliver core training, range of subjects or specialist training. Day to day staff management including work allocation and checking, appraisal, initial stages of grievance and discipline, assisting with recruitment; Delivers training on own specialist area or a range of health records subjects.	3ac
10. Responsibility for Information Resources	Data entry, text processing, storage of data. Processes and stores patient data using a computerised system, files paper data within the case record in retrievable format, process and transmit patient data using both paper and computerised systems, completion of staff record cards, timesheets.	2a
11. Responsibility for Research & Development	Undertake surveys or audits, as necessary to own work. Undertakes surveys or audits as required within own work environment e.g. to test effectiveness of procedures.	1
12. Freedom to Act	Clearly defined occupational policies, work is managed, rather than supervised. Manager available for reference, performance indicators demonstrate achievement against expected standard.	3
13. Physical Effort	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. Combination of sitting, standing and walking dealing with patient enquiries, telephone enquiries/Inputting at keyboard for most of day; lifting, sorting, filing, general handling of case records; Pushing trolleys with patient notes, retrieving records.	1-2abcd

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14. Mental Effort	Frequent concentration; work pattern predictable/unpredictable. Concentration while preparing case notes and letters/Dealing with frequent interruptions and competing demands from staff or work related queries.	2a–3a
15. Emotional Effort	Occasional distressing or emotional circumstances. Deals with distressed patients/relatives/staff.	2a
16. Working Conditions	Occasional unpleasant conditions. Dusty conditions in archive storage areas; verbal aggression (patients and/or staff).	2a
JE Score/Band	JE Score 271–292	Band 4

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Profile Label: Practice Manager (Small Practice)

Job Statement: 1. To manage non-clinical aspects of a medical practice and the practice staff.
2. To ensure the practice operates as an effective organisation.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Complex information, requires negotiating, persuasive skills, tact and diplomacy. Negotiates on behalf of Practice for budgets and with suppliers; Communicates regarding staff issues and patient complaints.	4
2. Knowledge, Training & Experience	A range of non-routine work procedures and practices. Diploma level knowledge required (12–18 months study) – detailed knowledge of range of legislative requirements.	4
3. Analytical & Judgemental Skills	A range of facts and situations which require analysis and comparison of a range of opinions. Judgements on a variety of staff and administrative problems.	3
4. Planning & Organisational Skills	Number of complex activities which require formulation and adjustment of plans. Administrative and business planning, staff planning.	3
5. Physical Skills	Standard keyboard skills.	2
6. Responsibility for Patient/Client Care	Provides general non-clinical advice. Informing patients of new initiatives/clinics/legislation.	2
7. Responsibility for Policy/Service Development	Implements policies within determined parameters. Implements changes to working practices following approval.	2
8. Responsibility for Financial & Physical Resources	Authorised signatory for cash/financial payments; Procurement of equipment and supplies. Authorised signatory; procures some/all clinical and office equipment for Practice.	3(a) (b) / 4(c)
9. Responsibility Human Resources	Responsible for day to day management of a group of staff. Responsible for discipline, workload planning and appraisals.	3(a)
10. Responsibility for Information Resources	Responsible for adapting information systems to meet the specifications of others. Responsible for introducing and adapting computer systems and new software, also information security.	4
11. Responsibility for Research & Development	Undertakes surveys/audits.	1
12. Freedom to Act	Guided by principles and broad occupational policies which may need interpretation. Works within Codes of Practice, occupational standards and policies and procedures.	4
13. Physical Effort	A combination of sitting, standing and walking with little requirement for physical effort.	1
14. Mental Effort	Frequent concentration, unpredictable work. Concentration during report writing and business planning.	3(a)
15. Emotional Effort	Exposure to distressing circumstances is rare.	1
16. Working Conditions	Exposure to unpleasant working conditions is rare.	1
JE Score/Band	JE Score 336–347	Band 5

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Profile Label: Clinical Coding Officer Team Leader

Job Statement:

1. Abstract, analyse and data entry patient records.
2. Deal with complicated enquiries; liaise with senior clinicians and attend multi-disciplinary team meetings.
3. Locate and collate all appropriate source material e.g. missing case notes, histology.
4. Allocate work to team members; day to day supervision of staff.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive complex information, persuasive and motivational skills required. Communicate complex coding rules to clinical coding staff, medical, clinical and administrative staff and external agencies; persuasive skills for dealing with senior managers and clinicians; motivational skills for staff.	4
2. Knowledge, Training & Experience	Understanding a range of work procedures requiring expertise within a specialism. Knowledge of computer use, coding procedures and conventions; knowledge of medical terminology, anatomical and physiological terms; acquired through work-based training, Accredited Clinical Coder qualification or equivalent experience.	4
3. Analytical & Judgemental Skills	Range of complex facts or situations requiring analysis, interpretation. Abstract and analyse complex patient clinical records; use judgement to translate complex cases where the procedure undertaken may not be readily codeable; application of coding conventions.	4
4. Planning & Organisational Skills	Planning and organisation of a number of straightforward tasks. Staff rotas/plan educational/training programmes.	2
5. Physical Skills	Standard keyboard skills. Input patient information into computer.	2
6. Responsibility for Patient/Client Care	Assists patients/clients/relatives during incidental contacts. Contact with patients is incidental e.g. on ward visits.	1
7. Responsibility for Policy/Service Development	Implements policies and proposes changes for own area, impact on other areas. Implements agreed local variations to coding rules; assists in the development of local coding policies which impact on medical and other clinicians.	3
8. Responsibility for Financial & Physical Resources	Responsible for maintaining stock control. Orders stationery for the office.	2(c)
9. Responsibility Human Resources	Day to day / professional supervision / provision of practical training. Day to day supervision of staff including work allocation/trains coders.	2(a) (b)
10. Responsibility for Information Resources	Data entry, text processing or storage of data. Process and codify patients' case notes, test results.	2(a)
11. Responsibility for Research & Development	Regularly undertakes R&D as part of the job. Undertakes complex audits.	2(a)
12. Freedom to Act	Guided by precedent and clearly defined occupational policies. Operate on own initiative, work is managed rather than supervised.	3
13. Physical Effort	Frequent requirement for sitting in a restricted position. Inputting into computer more or less continuously.	2(a)
14. Mental Effort	Frequent requirement for prolonged concentration. Concentration is required when converting information into codes, inputting – requires accuracy and constant checking of codes.	4(a)
15. Emotional Effort	Frequent indirect exposure to distressing or emotional circumstances. Daily indirect exposure to disturbing photographs and case notes about abuse and terminally ill patients.	2
16. Working Conditions	Use of VDU more or less continuously. VDU used for coding.	2
JE Score/Band	JE Score 326	Band 5

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Profile Label: Health Records Section Manager / Assistant Health Records Manager (Multi Section Unit)

- Job Statement:**
1. Manages the operational activities and the staff of a health records section.
 2. Provides on the job training to staff within the section.
 3. May assist the manager of a multi section unit.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive complex information; persuasive, motivational, negotiating, training skills are required. Communicates complex health records queries with own and other departments, training skills required for developing own and other staff, provides advice on legislation governing health records to non health records staff; negotiates with NHS/external organisations over service issues.	4a
2. Knowledge, Training & Experience	Expertise within specialism, underpinned by theory. Specialist knowledge acquired through professional qualification at degree level or equivalent, Diploma of the Institute of Health Record & Information Management (IHRIM) or equivalent plus experience.	5
3. Analytical & Judgemental Skills	Range of facts or situations requiring analysis. Problem solving skills and ability to analyse where procedures have failed to ensure correction in their subject area, provides advice and guidance to staff on disclosure of patient information in accordance with current legislation.	3
4. Planning & Organisational Skills	Plan and organise straightforward activities, some ongoing/Plan and organise complex activities or programmes, requiring formulation, adjustment. Organises meetings with a range of clinical and non-clinical staff to formulate service changes, plans for legislative changes to the health records service formulating policies and procedures for staff/Contributes to the health records management strategy for the organisation.	2-3
5. Physical Skills	Physical skills obtained through practice. Inputs patient information onto the computerised Patient Administration System. Manipulates case record trolleys.	2
6. Responsibility for Patient/Client Care	Provide non-clinical advice, information to patients/clients/relatives. Provides advice and guidance to patients and relatives on reception and by telephone on non-clinical issues.	2
7. Responsibility for Policy/Service Development	Propose policy or service changes, impact beyond own area. Attends meetings with service users, e.g. clinicians to discuss changes to policies or procedures that may affect other areas, e.g. introduction of new appointment system.	3
8. Responsibility for Financial & Physical Resources	Safe use of equipment other than equipment used personally; Maintain stock control; Authorised signatory, small payments. Responsible for the office equipment; Responsible for re-ordering of office supplies; Authorised signatory.	2bcd
9. Responsibility Human Resources	Day to day management; Teach/deliver specialist training/ Line manager for single function or department. Day to day management; delivers specialist training to a range of staff/ Line manager for section within Health Records.	3ac-4a
10. Responsibility for Information Resources	Responsible for maintaining one or more information systems, significant job responsibility. Manages storage and retrieval of information.	3c
11. Responsibility for Research & Development	Undertake surveys or audits, as necessary to own work. Undertakes surveys or audits as required within own work environment e.g. to test effectiveness of procedures.	1
12. Freedom to Act	Clearly defined occupational policies, work is managed, rather than supervised. Manager available for reference, performance indicators demonstrate achievement against expected standard.	3
13. Physical Effort	Combination of sitting, standing and 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. Combination of sitting, standing and walking, dealing with patient enquiries, telephone enquiries/Inputting at keyboard for most of day; Lifting, sorting, filing, general handling of case	1-2abcd

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	records; Pushing trolleys with patient notes, retrieving records.	
14. Mental Effort	Frequent concentration; work pattern predictable/unpredictable. Concentration while preparing case notes and letters/Dealing with frequent interruptions and competing demands from staff or work related queries.	2a–3a
15. Emotional Effort	Occasional distressing or emotional circumstances. Deals with distressed patients/relatives/staff.	2a
16. Working Conditions	Occasional unpleasant conditions. Dusty conditions in archive storage areas; verbal aggression from patients.	2a
JE Score/Band	JE Score 342–374	Band 5

National profiles for patient services

- Profile Label:** Clinical Coding Team Manager
- Job Statement:**
1. Manage the clinical coding service.
 2. Undertake long-term planning for clinical coding service.
 3. May undertake clinical coding audits.
 4. May plan and deliver formal training.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive complex information, developed negotiating, persuasive skills; cooperation and agreement required / presenting complex information to large groups of staff. Communicates complex coding issues; requires agreement, cooperation from clinical and other managers, and own staff / presents to junior doctors on induction, regional conferences.	4–5(b)
2. Knowledge, Training & Experience	Understand a range of work procedures, expertise within a specialism. Knowledge of computer use, coding procedures & conventions; knowledge of medical terminology, anatomical and physiological terms: acquired through work-based training, Accredited Clinical Coder qualification or equivalent experience; management qualification or equivalent experience/audit certification/training certification.	5
3. Analytical & Judgemental Skills	Judgements made involve complex facts or situations. Service/audit/training related judgements.	4
4. Planning & Organisational Skills	Planning and organisation of a broad range of complex activities requiring formulation of plans/ongoing planning strategies. Service/audit/training planning/long term service planning.	3–4
5. Physical Skills	Skills obtained through practice. Standard keyboard skills.	2
6. Responsibility for Patient/Client Care	Assists patients/clients/relatives during incidental contacts. Contact with patients is incidental e.g. on ward visits.	1
7. Responsibility for Policy/Service Development	Implements policies for own area / Responsible for policy implementation and policy or service development for a service. Develop departmental policies and procedures; Implement nationally agreed clinical coding policies / Develop Trust clinical coding policies.	3–4
8. Responsibility for Financial & Physical Resources	Hold delegated budget / budget holder for a department / service. Hold delegated budget for clinical coding department / Hold budget for clinical coding department.	3(d) – 4(a)
9. Responsibility Human Resources	Responsible as line manager for a department / teaching or devising training programmes. Line manager for clinical coding department / develop training programmes as major job responsibility.	4(a)(b)
10. Responsibility for Information Resources	Data entry, text processing or storage of data. Process and codify patients' case notes, test results.	2(a)
11. Responsibility for Research & Development	Regularly undertakes R&D / Major job requirement. Complex internal and external audits / major job requirement.	2(a)–3
12. Freedom to Act	Guided by principles and broad occupational policies. Manages service.	4
13. Physical Effort	Combination of sitting, standing and walking. Sitting, standing, walking.	1
14. Mental Effort	Occasional / frequent requirement for prolonged concentration. Concentration is required when converting information into codes, inputting – requires accuracy and constant checking of codes / frequent prolonged effort for audit work.	3(b)–4(b)
15. Emotional Effort	Frequent indirect exposure to distressing or emotional circumstances. Dealing with difficult staffing issues / indirect exposure to disturbing photographs about abuse and terminally ill patients.	2
16. Working Conditions	Exposure to unpleasant working conditions is rare. Office conditions.	1
JE Score/Band	JE Score 396–461	Band 6

National profiles for patient services

Profile Label: Practice Manager (Group Practice)

Job Statement:

1. Manages non-clinical aspects of group medical practice and practice staff.
2. Ensures the practice operates as an effective organisation.
3. Develops, monitors and maintains business initiatives.
4. Develops non-clinical policies, practices and procedures.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Communicates complex information requiring negotiating, persuasive skills. Negotiates with PCT on services to be provided by practice: advises partners & staff on external initiatives.	4(a)
2. Knowledge, Training & Experience	Expertise within specialism underpinned by theoretical knowledge or practical experience. Knowledge of admin / business management policies, procedures, practices: acquired through degree level education, professional qualification or equivalent.	5
3. Analytical & Judgemental Skills	Complex factors or situations requiring analysis, interpretation, comparison of options. Practice contract decisions, management issues, how to deal with complaints, implement national regulations, policies.	4
4. Planning & Organisational Skills	Complex activities requiring formulation, adjustments. Administrative & business planning, staff planning, seminars, co-ordination with other agencies.	3
5. Physical Skills	Skills obtained through practice. Standard keyboard, driving skills.	2
6. Responsibility for Patient/Client Care	Provides general non-clinical advice. Informs patients of new initiatives / services.	2
7. Responsibility for Policy/Service Development	Implements policies, proposes changes to policies, impact beyond own area. Responsible for implementing policies, government initiatives; develops policies with impact on clinical staff & other agencies e.g. risk management, health & safety.	3
8. Responsibility for Financial & Physical Resources	Budget setting for service; procurement of all supplies for service. Responsible for budget setting for practice; procurement of equipment & supplies.	4(b)(c)
9. Responsibility Human Resources	Day to day management / line manager for service. Allocates work, supervises, recruits, provides training for practice non-clinical staff / line manager for admin staff, including workload planning.	3(a) / 4(a)
10. Responsibility for Information Resources	Responsible for adapting information systems to meet specifications of others. Responsible for introduction, adaptation, maintenance of computer systems.	4 (a)
11. Responsibility for Research & Development	Undertakes surveys/audits Undertakes patient surveys, audit review of patients.	1
12. Freedom to Act	Broad occupational policies. Lead for non-clinical business/administration; manages non-clinical aspects of practice.	4
13. Physical Effort	Combination of sitting, standing, walking.	1
14. Mental Effort	Frequent concentration, unpredictable work. Concentration for business plans, reports, stats; frequent interruptions.	3(a)
15. Emotional Effort	Occasional exposure to distressing circumstances. Patient complaints, staffing issues.	2
16. Working Conditions	Exposure to unpleasant conditions is rare/occasional. Verbal aggression from patients.	1-2
JE Score/Band	JE Score 409-424	Band 6

National profiles for patient services

Profile Label: Health Records Multi Section Manager

Job Statement:

1. Responsible for the management and performance of multi health records sections.
2. Ensures patient information is processed in accordance with procedures and investigates complex enquiries providing assistance and advice as required.
3. Prepares and completes statutory/NHS returns ensuring that work is completed within the requisite timescales and legal requirements, interpreting these where necessary.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive complex, sensitive information; persuasive, motivational, negotiating, training skills are required. Communicates complex health records queries with own and other departments, training skills required for developing own and other staff, provides advice on legislation governing health records to non health records staff; negotiates with NHS/external organisations over service issues.	4a
2. Knowledge, Training & Experience	Specialist knowledge across range of procedures underpinned by theory. Specialist knowledge and expertise across one or more specialised areas including clinical staff and other managers on matters relating to their own area, providing detailed advice and guidance, acquired through professional qualification at Degree level, Diploma of the Institute of Health Record & Information Management (IHRIM) or equivalent plus specialist experience and knowledge of management, information systems and legislation.	6
3. Analytical & Judgemental Skills	Complex facts or situations requiring analysis, interpretation, comparison of a range of options. Analyses, investigates and resolves complex health records queries and issues/problems; Develops and advises on complex business plans; Interprets legislation affecting the health records service.	4
4. Planning & Organisational Skills	Plan and organise complex activities or programmes, requiring formulation, adjustment. Develops and contributes to long term plans within a structured framework; Makes plans to implement legislative changes; Daily adjustments; Co-ordinates and plans activities.	3
5. Physical Skills	Physical skills obtained through practice. Inputs patient information onto the computerised Patient Administration System.	2
6. Responsibility for Patient/Client Care	Assist patients/clients during incidental contacts. Contact with patients is incidental e.g. patient forums and subject access requests.	1
7. Responsibility for Policy/Service Development	Propose policy or service changes, impact beyond own area. Suggests changes to and implements policies and procedures in own area or section, proposes changes to policies and procedures which have an impact in other areas e.g. re-design of case note architecture.	3
8. Responsibility for Financial & Physical Resources	Authorised signatory; Monitor budgets or financial initiatives; Hold delegated budget. Authorised signatory for signing off travel expenses; Monitors budget and/or income generation initiatives for own sections; Holds delegated budget/Responsible for budget and physical assets.	3acd
9. Responsibility Human Resources	Day to day management; Teach/deliver specialist training/ Line manager for single function or department. Work allocation, checking and evaluating work, identifying training needs; Delivers training on own specialist area or range of health records subjects/ Involved in recruitment, disciplinary, appraisal.	3ac-4a
10. Responsibility for Information Resources	Responsible for maintaining one or more information systems, significant job responsibility/ Responsible for operation of one or more information systems for department/service, major job responsibility. Manage storage and retrieval of information/records / Manage the operation of systems which process, update and store information.	3c-4b
11. Responsibility for Research & Development	Undertake surveys or audits, as necessary to own work. Participates in work-based audits.	1
12. Freedom to Act	Broad occupational policies. Works to achieve agreed objectives and has freedom to do this in own way working within organisational and broad professional policies; acts without reference to manager; acts as lead specialist.	4

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13. Physical Effort	Combination of sitting, standing and walking. Light physical effort.	1
14. Mental Effort	Frequent concentration; work pattern predictable/unpredictable. Concentration required when analysing data, checking and reconciling information, answering queries from staff, patients/ May be required to switch tasks.	2a–3a
15. Emotional Effort	Occasional distressing or emotional circumstances. Deals with staff performance and disciplinary issues.	2a
16. Working Conditions	Exposure to unpleasant conditions is rare. Office conditions.	1
JE Score/Band	JE Score 416–440	Band 6

National profiles for patient services

Profile Label: Voluntary Services Manager

Job Statement:

1. Develops, promotes, organises and manages voluntary services across the organisation.
2. Establishes and develops effective policies for the utilisation of volunteers.
3. Recruits, trains and places volunteers.
4. May have the responsibility for fundraising.

Factor	Relevant Job Information	JE level	JE Score
1. Communication & Relationship Skills	Provide and receive complex information; persuasive, motivational, negotiating, training skills are required. Communicates with range of staff, external organisations and agencies, requiring persuasive and motivational skills; deals with complaints, conduct and performance issues.	4(a)	32
2. Knowledge, Training & Experience	Specialist knowledge across the range of work procedures and practices underpinned by theoretical knowledge or relevant practical experience. Knowledge of voluntary services and relevant legislation to degree or equivalent level plus management knowledge and experience.	6	156
3. Analytical & Judgemental Skills	Judgements involving facts or situations, some requiring analysis. Assessment and placement of volunteers, dealing with conduct/performance/grievance issues, dealing with complaints. Assessment of new schemes and determining funding requirements.	3	27
4. Planning & Organisational Skills	Plan and organise complex activities or programmes requiring formulation, adjustment/ broad range of complex activities requiring formulation adjustment of plans, strategies. Plans recruitment processes, rotas, meetings, social events, and training events/ overall responsibility for planning of volunteer services.	3–4	27–42
5. Physical Skills	Physical skills obtained over time. Standard keyboard skills.	2	15
6. Responsibility for Patient/Client Care	Assists patients during incidental contact. Gives occasional assistance to patients when necessary.	1	4
7. Responsibility for Policy/Service Development	Responsible for policy implementation and for discrete policy or service development for a service. Responsible for development of voluntary services and for Voluntary Services policies, which impact across the Trust.	4	32
8. Responsibility for Financial & Physical Resources	Responsible for purchase of some supplies; Authorised signatory; Holds delegated budget/Budget Holder. Verifies expenses, overtime/ Purchases goods and equipment; authorised signatory; delegated budget responsibility /Budget holder.	3 (a) (b) (d) – 4 (a)	21–32
9. Responsibility Human Resources	Day to day management/Line Manager for single function or department. Day to day /Line manager for voluntary services function.	3(a) – 4(a)	21–32
10. Responsibility for Information Resources	Occasional requirement to use computer software to develop or create reports, documents, drawings/ responsible for maintaining one or more information systems, significant job responsibility. Creates posters, leaflets, newsletters and report using computer software/ maintains volunteer database.	2(b)–3(c)	9–16
11. Responsibility for Research & Development	Undertake surveys or audits, as necessary to own work. Undertakes satisfaction surveys.	1	5
12. Freedom to Act	Guided by principles and broad occupational policies or regulations. Works autonomously; manages voluntary services; interprets policies.	4	32
13. Physical Effort	Combination of sitting, standing, walking with little requirement for physical effort. Little physical effort.	1	3
14. Mental Effort	Frequent concentration, work pattern predictable/unpredictable; occasional prolonged. Concentration required when interviewing, producing reports, attending meetings, analysing statistics, training/ frequent interruptions to deal with service issues;	2(a) 3(a)(b)	7–12

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	prolonged concentration for e.g. assisting volunteers to complete benefit forms.		
15. Emotional Effort	Occasional/frequent distressing or emotional situations. Deals with performance issues.	2(b) 3(a)	11–18
16. Working Conditions	Exposure to unpleasant working conditions is rare. Standard working conditions.	1	3
JE Score/Band		Band 6	405–461

National profiles for patient services

Profile Label:

Clinical Coding Service Manager

Job Statement:

1. Manage the operational and strategic coding service.
2. Manage and provide training on and audit of clinically coded data.
3. Undertake long term planning for the clinical coding service.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive highly complex, sensitive or contentious information; barriers to understanding; Presents complex information to large groups of staff. Negotiates annual budget, explains to the Board the results and implications for trust ratings of audits; gives presentations to clinical and senior management staff and to regional conferences.	5(a) (b)
2. Knowledge, Training & Experience	Specialist knowledge across range of procedures underpinned by theory. Knowledge of computer use, coding procedures & conventions; knowledge of medical terminology, anatomical and physiological terms; acquired through work-based training, Accredited Clinical Coder qualification or equivalent experience, management qualification or equivalent experience to postgraduate level.	6
3. Analytical & Judgemental Skills	Plan and organise broad range of complex activities; formulates, adjusts plans or strategies. Judgements where opinion is divided when coding complex cases or procedures previously uncoded.	4
4. Planning & Organisational Skills	Plan and organise broad range of complex activities; formulates, adjusts plans or strategies. Plans clinical coding strategy and service.	4
5. Physical Skills	Physical skills obtained through practice. Standard keyboard skills.	2
6. Responsibility for Patient/Client Care	Assist patients/clients during incidental contacts. Contact with patients is incidental e.g. on ward visits.	1
7. Responsibility for Policy/Service Development	Responsible for policy implementation and development for a service. Develops and implements clinical coding policies for the organisation.	4
8. Responsibility for Financial & Physical Resources	Budget holder for a department/service. Budget holder for clinical coding department.	4(a)
9. Responsibility Human Resources	Line Manger for a single function or department; teach, devise training and development programmes, major job responsibility. Line manager for clinical coding department; develop training programmes as major job responsibility.	4(a) (b)
10. Responsibility for Information Resources	Responsible for maintaining one or more information systems, significant job responsibility. Responsible for updating and maintaining information system within clinical coding.	3(c)
11. Responsibility for Research & Development	Undertake surveys or audits, as necessary to own work / Regularly undertakes R&D activity. Completes survey forms / Complex internal and external audits / major job requirement.	1 / 2 (a)
12. Freedom to Act	Broad occupational policies. Interprets clinical coding policies; responsible for the department and the clinical coding function throughout the organisation.	4
13. Physical Effort	Combination of sitting, standing and walking. Light physical effort.	1
14. Mental Effort	Frequent concentration; work pattern unpredictable. Concentration is required when converting information into codes, may have to deal with unplanned incidents and staffing issues.	3 (a)
15. Emotional Effort	Occasional / frequent indirect distressing or emotional circumstances. Dealing with difficult staffing issues; exposure to disturbing photographs of abused and terminally ill patients.	2(a) 2(b)
16. Working Conditions	Exposure to unpleasant conditions is rare. Office conditions.	1
JE Score/Band	JE Score 482–489	Band 7

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Profile Label:

Health Records Department Manager

Job Statement:

1. Responsible for the overall management and performance of a health records department.
2. Ensures information is processed in accordance with procedures; investigates highly complex enquiries providing assistance and advice as required and contributes to reporting.
3. Provides strategic, business planning advice.
4. Interpreting information to complete statutory NHS returns, ensuring that work is completed in line with local and national timescales and legal requirements, interpreting these where necessary.

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive complex information; persuasive, motivational, negotiating, training skills are required. Communicates health record and information management issues with senior management and clinical staff some of which may be contentious; deals with performance and staffing issues; negotiates with NHS/external organisations over service issues; provides specialist training.	4a
2. Knowledge, Training & Experience	Highly developed specialist knowledge, underpinned by theory and experience. In depth specialist knowledge over a range of management, operational and legislative areas acquired through Masters or equivalent experience plus specialist experience and expertise in health information and staff management.	7
3. Analytical & Judgemental Skills	Complex/highly complex facts or situations requiring analysis, interpretation, comparison of a range of options. Analyses complex problems relating to business case production where there are a multiplicity of targets/ objectives; Interprets complex data sets / Makes judgements on patient information where there is no precedent and where opinions may conflict.	4-5
4. Planning & Organisational Skills	Plan and organise complex activities or programmes, requiring formulation, adjustment/Plan and organise broad range of complex activities; formulates, adjusts plans or strategies. Develops and contributes to long term plans within a structured framework; Makes plans to implement legislative changes; Daily adjustments; Co-ordinates and plans activities / Plans and implements projects which impact across the organisation; Continuous delivery of health information services; Contributes to the medium and long term strategy of the organisation.	3-4
5. Physical Skills	Physical skills obtained through practice. Requires standard keyboard skills.	2
6. Responsibility for Patient/Client Care	Assist patients/clients during incidental contacts. Contact with patients is incidental e.g. patient forums and subject access requests.	1
7. Responsibility for Policy/Service Development	Propose policy or service changes, impact beyond own area/ Responsible for policy implementation and development for a service or more than one area of activity. Suggests changes to and implements policies and procedures in own area, proposes changes to policies and procedures which have an impact in other areas (e.g. redesign of health information systems/ Responsible for developing policy implementation and development for a service.	3-4
8. Responsibility for Financial & Physical Resources	Budget holder for department/service. Budget holder for health information department.	4a
9. Responsibility Human Resources	Line manager for single function or department. Work allocation, checking and evaluating work, identifying training needs, involved in recruitment, disciplinary, appraisal.	4a
10. Responsibility for Information Resources	Responsible for maintaining one or more information systems, significant job responsibility/ Responsible for the operation of one or more information systems for department/service, major job responsibility. Manage storage and retrieval of information/records/ Manage the operation of systems which process, update and store information.	3c-4b
11. Responsibility for Research & Development	Undertake surveys or audits as necessary to own work. Regularly conducts or participates in work-based audits within the department.	1
12. Freedom to Act	Broad occupational policies. Works to achieve agreed objectives and has freedom to do this in own way working within organisational and broad professional policies; Acts without reference to manager; Departmental manager.	4

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13. Physical Effort	Combination of sitting, standing, walking. Light physical effort.	1
14. Mental Effort	Frequent concentration; work pattern predictable/unpredictable. Concentration required when analysing data, checking and reconciling information, answering queries from staff, patients/ May be required to switch tasks.	2a–3a
15. Emotional Effort	Occasional distressing or emotional circumstances. Deals with staff performance and disciplinary issues.	2a
16. Working Conditions	Exposure to unpleasant conditions is rare. Office conditions.	1
JE Score/Band	JE Score 478–535	Band 7

National profiles for patient services

Profile Label:

Health Records Services Manager

Job Statement:

1. Responsible for the overall management of a health information service.
2. Ensures efficiency, effectiveness, integrity and business focus of service.
3. Investigates and advises on highly complex health information issues and leads on reporting, strategic and business planning advice.
4. Ensures all statutory returns represent a true and fair view, meet timescales and legal requirements, interpreting these where necessary.

Factor	Relevant Job Information	JE Level
1. Communication & Relationship Skills	Provide and receive highly complex, sensitive or contentious information; agreement or cooperation required; Present complex, sensitive or contentious information to large groups. Advises senior managers on health information issues persuading them to a certain course of action; delivers and develops formal complex presentations (i.e. multi-faceted business cases and training, presentations to boards) to large groups of staff clearly and persuasively; negotiates with NHS /external organisations over significant service issues.	5ab
2. Knowledge, Training & Experience	Highly developed specialist knowledge, underpinned by theory and experience. In depth specialist knowledge over a range of management, operational and legislative areas acquired through Masters or equivalent experience plus specialist experience and expertise in health information and staff management.	7
3. Analytical & Judgemental Skills	Highly complex facts or situations requiring analysis, interpretation, comparison of a range of options. Makes judgements on patient information and associated risks where there is no precedent and where opinions may conflict.	5
4. Planning & Organisational Skills	Plan and organise broad range of complex activities; formulates, adjusts plans or strategies/ Formulate long term, strategic plans, involving uncertainty, may impact across the whole organisation. Plans and implements projects which impact across the department & organisation; Continuous delivery of health record services across the organisation; Contributes to the medium and long term organisation strategy/Develops and takes the lead on long term business and strategic planning for health records for the whole organisation.	4-5
5. Physical Skills	Physical skills obtained through practice. Standard keyboard skills.	2
6. Responsibility for Patient/Client Care	Assist patients/clients during incidental contacts. Contact with patients is incidental e.g. patient forums and subject access requests.	1
7. Responsibility for Policy/Service Development	Responsible for policy implementation and development for a service or for more than one area of activity/Responsible for policy implementation & development for directorate or equivalent. Responsible for developing policy and procedures in particular areas of health information and other services which will impact across the whole organisation/Develops policies and practices for the organisation, working jointly with other organisations to create a consistent approach; Implements national policies and practices.	4-5
8. Responsibility for Financial & Physical Resources	Budget holder for department/service/ Responsible for budget for several services. Develops and monitors budgets for own department/service, authorises spend against it/ Develops and manages the budget for a large part of the health records/information function or the whole of the function.	4a-5a
9. Responsibility Human Resources	Line manager for single function or department/ several/multiple departments. Acts as line manager for more than one service e.g. outpatients, health records, information governance.	4a-5a
10. Responsibility for Information Resources	Adapt, design information systems to meet specifications of others; Responsible for the operation of one or more information systems for department/service, major job responsibility/Design and develop major information systems to meet specifications of others. Responsible for introducing, adapting and improving operational information systems in own area of use and use by others; Manage operation of system(s) which process, update and store information.	4ab-5a

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11. Responsibility for Research & Development	Undertake surveys or audits, as necessary to own work/ Regularly undertake R&D activity. Undertakes surveys or audits for own work/ Conducts complex audits designed to improve service quality.	1–2a
12. Freedom to Act	General policies, need to establish interpretation. Works autonomously, and interprets available standards e.g. DoH policy, Information Governance, Accreditation Standards.	5
13. Physical Effort	Combination of sitting, standing, walking. Light physical effort.	1
14. Mental Effort	Frequent concentration; work pattern predictable/unpredictable. Concentration required when analysing data, checking and reconciling information, answering queries from staff, patients/ May be required to switch tasks.	2a–3a
15. Emotional Effort	Occasional distressing or emotional circumstances. Deals with staff performance and disciplinary issues.	2a
16. Working Conditions	Exposure to unpleasant conditions is rare. Office conditions.	1
JE Score/Band	JE Score 556–635	Band 8a–c