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Secretarial and Clerical Generic Profiles

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 could not combine with Secretary (entry level), since it has a KTE of 3, so we have included this on its own in this group of profiles.

Secretarial and Clerical Generic Profiles

Profile Label:	Clerical Officer/Receptionist
Job Statement	<ol style="list-style-type: none"> 1. Provides clerical support/reception service 2. Answers general queries 3. Carries out administrative tasks

Factor	Relevant Job Information	JE Level	Score
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 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	2-3a	12-21
2. Knowledge, training & experience	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	2	36
3. Analytical & judgemental skills	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	2	15
4. Planning & organisational skills	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	1-2	6-15
5. Physical skills	Physical skills obtained through practice/Developed physical skills: advanced keyboard use Standard keyboard skills, manoeuvring notes trollies/ Entering patient / client data into computer	2-3	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/ Provides non-clinical information or advice to patients or relatives	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 departmental procedures and policies	1	5
8. Responsibility for financial & physical resources	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	1-2ac	5-12
9. Responsibility for Human Resources	Demonstrate own activities to new or less experienced employees Demonstrates activities to new starters	1	5
10. Responsibility for Information Resources	Data entry, text processing, storage of data Processes or transcribe data, patient records	2a	9
11. Responsibility for Research & Development	Undertake surveys or audits, as necessary to own work Completes staff surveys and audits	1	5
12. Freedom to Act	Standard operating procedures, someone available for reference Uses initiative within standard operating procedures, advice available	2	12
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	1-2abcd	3-7

Secretarial and Clerical Generic Profiles

Factor	Relevant Job Information	JE Level	Score
	periods Light physical effort/ at keyboard for long periods; lifting, sorting, filing, general handling of records; pushing trolleys with case notes		
14. Mental Effort	Frequent concentration; work pattern predictable Concentration for eg preparing notes, filing, taking and accessing patient details, answering queries, processing data and records	2a	7
15. Emotional Effort	Exposure to distressing or emotional circumstances is rare/ Occasional/ Frequent distressing or emotional circumstances Interacting with terminally ill patients	1a- 2a-3a	5-11- 18
16. Working Conditions	Exposure to unpleasant conditions is rare/ Occasional unpleasant conditions; Use VDU equipment more or less continuously/ Frequent unpleasant conditions; Occasional highly unpleasant conditions 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	1- 2ae- 3ab	3-7- 12
JE Score/Band	(Band 2 range: 161-215)	Band 2	147- 215

Secretarial and Clerical Generic Profiles

Profile Label: **Secretary (Entry Level)**

Job Statement: 1. Provide secretarial support to non-medical staff
2. Liaises with other departments
3. Maintains records

Factor	Relevant Job Information	JE Level
1. Communication & Relationship Skills	Provide and receive routine information, to inform work colleagues, patients, clients Provide information to staff from other departments, external contacts	2
2. Knowledge, Training & Experience	Range of work procedures and practices; base level of theoretical knowledge Knowledge of secretarial or administrative procedures and systems, some of which are non-routine and non-routine activities such as answering queries, progress chasing, task-related problem solving, acquired through experience and training to Vocational Level 3 or equivalent.	3
3. Analytical & Judgemental Skills	Judgements involving facts or situations, some requiring analysis Prioritises work, resolves conflicting diary appointments and schedules	2
4. Planning & Organisational Skills	Plan and organise straightforward activities, some ongoing Arranges meetings on a regular basis, manages diary	2
5. Physical Skills	Developed physical skills; advanced keyboard use Touch typing	3(a)
6. Responsibility for Patient/ Client Care	Assist patients/clients during incidental contacts Incidental contact with patients	1
7. Responsibility for Policy/ Service Development	Follow policies in own role, may be required to comment May comment on existing secretarial policies and procedures	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 office equipment/responsible for petty cash; maintains departmental stationery stock	1/2(a)/2(c)
9. Responsibility for Human Resources	Demonstrate own activities to new or less experienced employees Demonstrates duties to new starters	1
10. Responsibility for Information Resources	Data entry, text processing, storage of records; Take and transcribe formal minutes Process and store records/transcribe and type up formal minutes	2(a)/3(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 Guided by standard operating procedures, someone generally available for reference	2
13. Physical Effort	Frequent sitting or standing in a restricted position Word process and input for a substantial proportion of working time	2(a)
14. Mental Effort	Frequent concentration; work pattern predictable Concentration for transcribing, typing complicated documents	2(a)
15. Emotional Effort	Exposure to distressing or emotional circumstances is rare Limited exposure	1
16. Working Conditions	Use VDU equipment more or less continuously Word process for substantial proportion of time	2
JE Score/Band	JE Score 200 – 214	Band 2



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.

Secretarial and Clerical Generic Profiles

Profile Label: Secretary/Medical Secretary/Admin team leader/Receptionist HL (GP practice)

Job Statement:

1. Provides secretarial/administrative support/maintains records
2. Deals with first line enquiries eg from patients, relatives and staff
3. Coordinates waiting lists/clinics
4. May supervise other staff

Factor	Relevant Job Information	JE Level	Score
1. Communication & Relationship Skills	Provide and receive routine information requiring tact or persuasive skills, barriers to understanding; Provide and receive complex or sensitive information 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	3ab	21
2. Knowledge, Training & Experience	Range of work procedures and practices; base level of theoretical knowledge Knowledge of secretarial or administrative procedures and systems, some of which are non-routine, and non-routine activities such as answering queries, progress chasing, task-related problem solving, acquired through experience and training to Vocational Level 3 or equivalent	3	60
3. Analytical & Judgemental Skills	Judgements involving facts or situations, some 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 Plans staff rotas and cover; schedules clinics; arranges meetings; manages diaries	2	15
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	Handle cash, valuables; Safe use of equipment other than equipment used personally; Maintain stock control; Authorised signatory, small payments 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; 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
10. Responsibility for Information Resources	Data entry, text processing, storage of data / Take, transcribe formal minutes; Responsible for maintaining one or more information systems, significant job responsibility Updates, maintains, stores clinical or non-clinical records, appointment details/ Takes, transcribes formal minutes; maintains computerised appointment system	2a-3ac	9-16
11. Responsibility for Research & Development	Undertake surveys or audits, as necessary to own work Completes staff surveys	1	5
12. Freedom to Act	Standard operating procedures, someone available for reference/ Clearly defined occupational policies, work is managed, rather than supervised Deals with enquiries and implements procedures guided by standard operating practices, someone normally available for reference/Works independently to defined	2-3	12-21

Secretarial and Clerical Generic Profiles

Factor	Relevant Job Information	JE Level	Score
	policies and procedures, manages own workload		
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/ 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	1-2abcd-3	3 - 7-12
14. Mental Effort	Frequent concentration; work pattern predictable/ Unpredictable Concentration for administrative and secretarial duties, work pattern predictable/Interruptions from medical staff, external agencies	2a-3a	7-12
15. Emotional Effort	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	1-2a-3a	5-11-18
16. Working Conditions	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	1-2ae	3-7
JE Score/Band	(Band 3 range: 216-270)		196 – 274

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 included the General Office Manager/Admin Team Leader published profile as a separate profile in this group because its ranges were so different from the others.

Secretarial and Clerical Generic Profiles

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

Factor	Relevant Job Information	JE Level	Score
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
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 Updates, maintains, stores clinical or non-clinical records, appointment details/	2ab-3abc	9-16

Secretarial and Clerical Generic Profiles

Factor	Relevant Job Information	JE Level	Score
	Takes, transcribes formal minutes; creates databases to collect and monitor information; maintains and updates databases, regular requirement to develop or create reports and documents		
11. Responsibility for Research & Development	Undertake surveys or audits, as necessary to own work Completes staff surveys	1	5
12. Freedom to Act	Clearly defined occupational policies, work is managed, rather than supervised Works independently to defined policies and procedures, manages own workload	3	21
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/ 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	1-2abcd -3bc	3-7-12
14. Mental Effort	Frequent concentration; work pattern predictable/ Unpredictable Concentration for administrative and secretarial duties, work pattern predictable/ Interruptions from medical staff, external agencies	2a-3a	7-12
15. Emotional Effort	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	1-2b	5-11
16. Working Conditions	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	1-2ae	3-7
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)

Secretarial and Clerical Generic Profiles

Profile Label: General Office Manager / Admin Team Leader
 Job Statement: 1. To provide a comprehensive General Office/Cashier service
 2. To manage the front of house reception and resource room
 3. To provide support to, for example, Finance or Facilities Management

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Routine information, barriers to understanding: sensitive information Communicates with staff, patients, general public and external agencies. Negotiates contracts with external services, e.g. library service. Motivates staff re. opportunities for personal development. Communicates with bereaved families re. hospital burials	3(a)(b)
2. Knowledge, Training & Experience	Range of work procedures and practice, majority non-routine BTEC or equivalent level knowledge of a range of trust policies and management procedures, requiring ongoing on-the-job training and experience	4
3. Analytical & Judgemental Skills	Judgements involving range of facts, requiring analysis Analyses financial spreadsheets to determine trends or highlight potential problems	3
4. Planning & Organisational Skills	Number of complex activities, formulation and adjustment of plans Reorganisation of working practices, staff training programmes	3
5. Physical Skills	Standard keyboard skills Word processing	2
6. Responsibility for Patient/ Client Care	General non-clinical advice Advice on patients' property, travel expenses	2
7. Responsibility for Policy/ Service Development	Implement policies for own area, propose changes impacting beyond own area Implements trust policies for own area, proposes changes to administrative policies	3
8. Responsibility for Financial & Physical Resources	Holds a delegated budget/responsible for purchase of physical assets/authorises financial payments Delegated budget for office equipment and services: authorises travel expenses	3(a)(b)(d)
9. Responsibility for Human Resources	Day to day manager for department Direct management, including first level grievances and discipline, appraisals, allocation of work, training and development	3(a)
10. Responsibility for Information Resources	Data entry, text processing Processes a variety of finance and admin information	2(a)
11. Responsibility for Research & Development	Occasionally participates in research	1
12. Freedom to Act	Guided by precedent and clearly defined procedures Works without supervision, advice available from Line Manager when required	3
13. Physical Effort	Combination of sitting/standing/walking: Occasional requirement for moderate effort, short periods Lifts money/stationery	1-2(d)
14. Mental Effort	Frequent concentration, work pattern unpredictable Work interrupted to deal with queries	3(a)
15. Emotional Effort	Occasional exposure to distressing circumstances Deals with bereaved relatives; staff issues	2
16. Working Conditions	Occasional exposure to unpleasantness Dealing with verbally aggressive visitors and patients	2(a)
JE Score/Band	JE Score 318 – 322	Band 4

Secretarial and Clerical Generic Profiles

Band 5

The current Personal Assistant has been moved from Office Services to this group.

Secretarial and Clerical Generic Profiles

Profile Label:
Job Statement:

Personal Assistant

1. Co-ordinates administrative and secretarial services, including e.g. the preparation of agendas and minutes, taking appropriate follow-up action as required
2. Supervises and co-ordinates administrative/secretarial staff
3. Undertakes the management of projects and gathers information and/or undertakes enquiries

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	Provide and receive complex, sensitive information; persuasive, motivational, negotiating, training skills are required Communicating complex, sensitive information with a range of staff internally and externally across the organisation/organisations; liaises with external organisations, negotiating and persuasive skills required	4(a)
2. Knowledge, Training & Experience	Expertise within specialism, underpinned by practical experience Knowledge of the full range of administrative and organisational policies and procedures, acquired through training and relevant experience to degree level or equivalent	5
3. Analytical & Judgemental Skills	Range of facts or situations requiring analysis Skills for investigating a variety of issues and proposing solutions; dealing with complex enquiries	3
4. Planning & Organisational Skills	Plan and organise straightforward activities, some ongoing/plan and organise complex activities or programmes, requiring formulation, adjustment Plans and organises meetings; prioritise own project work/organises a range of events and conferences, including organising speakers; manage a range of projects	2/3
5. Physical Skills	Developed physical skills; advanced keyboard use Skills for keyboard use for producing reports, spreadsheets and correspondence	3(a)
6. Responsibility for Patient/ Client Care	Assist patients/clients during incidental contacts/provide non-clinical advice, information to patient/clients/relatives Occasional contact with patients or clients/provides non-clinical advice to patients/clients	1/2
7. Responsibility for Policy/ Service Development	Implement policies and propose changes to practices, procedures for own area Develops administrative policies	2
8. Responsibility for Financial & Physical Resources	Authorised signatory, small payments/monitor budgets or financial initiatives; hold delegated budget Authorised signatory for petty cash payments, agency time sheets/monitors budgets; holds administrative budget	2(d)/3(c)(d)
9. Responsibility for Human Resources	Day to day supervision/management Day to day supervision/management of a team of staff, including work allocation	2(a)-3(a)
10. Responsibility for Information Resources	Take, transcribe formal minutes; Regular requirement to create reports, documents, drawings Takes and transcribes formal minutes of meetings; advanced level use of IT packages, including Word, Excel, Outlook, Power Point, Publisher to create reports	3(a)(b)
11. Responsibility for Research & Development	Occasionally participate in R & D Carries out enquiries in relation to own work	1
12. Freedom to Act	Clearly defined occupational policies, work is managed, rather than supervised/broad occupational policies Works autonomously, but can seek advice when necessary/manages a discrete area of work	3-4
13. Physical Effort	Combination of sitting, standing, walking Light physical effort	1
14. Mental Effort	Frequent concentration; work pattern predictable/unpredictable Concentration for creating reports, transcribing minutes/there may be interruptions to deal with unforeseen events	2(a)/3(a)
15. Emotional Effort	Occasional/frequent distressing or emotional circumstances Staff performance issues, dissatisfied patients/clients, dealing with complaints	2(a)-3(a)
16. Working Conditions	Exposure to unpleasant conditions is rare Office conditions	1
JE Score/Band	JE Score 327 – 385	Band 5

Secretarial and Clerical Generic Profiles