



**CLIENT CARE & MEDICAL RECORDS COORDINATOR
JOB DESCRIPTION**

<u>Position:</u>	Client Care & Medical Records Coordinator (75% Client Care & 25% Medical Records)	<u>Department:</u>	Health Information Management
<u>Schedule:</u>	Monday through Friday with rare weekends	<u>Time/Status:</u>	Regular, Full-time, Exempt
<u>Reports To:</u>	Chief Compliance Officer	<u>Benefits:</u>	Medical, Dental, Vision; 401K; PTO
<u>Work Location:</u>	<u>Primary:</u> HopeWay Foundation (inclusive of HopeWay Wellness) <u>Secondary:</u> HopeWay Psychiatry & Associates <u>Remote:</u> Up to 20% of scheduled work hours with supervisor approval and 85% average KPI scores		

Summary: The Client Care & Medical Records Coordinator (CCMRC) is responsible for:

- (1) Scheduling and coordinating clients' community aftercare appointments and ensuring clients have a clear and precise understanding of his/her/their scheduled aftercare appointments upon completion of his/her/their treatment at HopeWay.
- (2) Assists providers with the completion of special forms (e.g., SDI, LDI, FMLA) and other documentation (e.g., letters for work or school) for clients;
- (3) Identifying and finalizing (in conjunction with the treatment team) aftercare services for all clients participating in any level of care with the goal of sustaining and enhancing gains made during treatment at HopeWay.
- (4) The maintenance, storage, processing, and releasing of all medical records and EHR data. This involves performing a variety of clerical and technical duties associated with the management and oversight of a program's medical records including, but not limited to: assembling, analysis, release of information, data processing, collection, reconciliation and preparation of reports in a manner consistent with medical, administrative, ethical, legal and regulatory requirements of a mental health care system.

- Primary Responsibilities:**
- Primary liaison between HopeWay, the client, and community aftercare resources.
 - Provides information to internal and external inquiries to ensure needs are met and in accordance with policy and procedure regarding disclosure of information.
 - Ensures the aftercare treatment settings receive the necessary clinical documentation on each client to allow them to provide effective, coordinated care.
 - Educates clients and team members about available and clinically appropriate aftercare options.
 - Completes required forms/documents necessary to access post-discharge services.
 - Contacts clients within seven (7) days and at thirty (30) days post-discharge to assess adherence with aftercare treatment recommendations.
 - Maintains an aftercare resource list to facilitate efficient aftercare planning.
 - Prepares and processes the clinical records of clients who are admitted/discharged from HopeWay.
 - Reviews medical records for content, accuracy, and completeness; verifies client information, forms, and records; resolves routine errors and completes records processing in accordance with policies and procedures.
 - Ensures that data is collected accurately and on time.
 - Ensures that clinical staff understands the significance of inputting key data elements, such as release of information, group notes, and progress notes.
 - Ensures that clients' demographic and episodic information is documented within specified timeframes.
 - Retrieves and researches medical health charts; completes a variety of forms and documents relating to entries in medical records.
 - Working knowledge of managing a hybrid medical record system, inclusive of EHR System experience (EPIC desired).



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- Verify client information; prepares and indexes documents in Electronic Health Record (EHR) system; verifies the accuracy of scanned documents with source documents and ensures documents are legible and properly indexed for accurate retrieval.
- Verifies accuracy of EHR data.
- Assists in the development of and compliance with the policies and procedures to ensure that medical records are complete and processed according to governmental regulations and standard professional and medical record keeping practices.
- Monitors and tracks compliance with legal documents and correspondence with clients, as well as internal and external stakeholders.
- Audits clinical records for completeness and adherence to standards.
- Generates reports to confirm accuracy of data and makes corrections.
- Seeks and implements improvements as necessary.
- Completes and follows through with tasks and assignments, meeting deadlines.
- Other duties as assigned.
- Works independently and as part of a multidisciplinary team with professionalism, respect, integrity, and a strong work ethic.
- Professionally interacts and communicates both verbally and in writing with clients, family members, the general public, providers, and staff.
- Caring, compassionate, and strong team player.
- Demonstrate a high degree of flexibility and cooperation.
- Exhibits excellent customer service toward internal/external clients, guests, contractors, licensed healthcare providers, and coworkers by demonstrating skills which are consistent with HopeWay's philosophy regarding extraordinary customer relations and quality of service.
- Manages difficult or conflict situations constructively and seeks appropriate assistance.
- Detail-oriented with strong problem-solving skills.
- Participate in medical records committee and treatment team meetings.
- Multitask in fast-paced work environment.
- Effective verbal and written communication
- Function calmly in situations which require a high degree of sensitivity, tact, and diplomacy.
- Exercise appropriate judgment in coordinating aftercare; answering questions and releasing information; analyze and project consequences of decisions and/or recommendations.
- Basic computer programs, MS Office, MS Office 365, and electronic health records.
- Ability to type 40 WPM.
- Knowledge, application, and understanding of
 - Medical and psychological terminology
 - The Joint Commission, local, state, and federal regulations, survey process, accreditation standards, and behavioral health requirements.
 - Appropriate coding systems (ICD-10, DSM 5).
 - Documentation, releasing information, and legal issues pertaining to HIPAA, PHI, CFR 42 Part 2, and other health information.
 - CAQH and provider/clinician credentialing process or willingness to learn.
- Ability to sit and walk, with daily occasional stooping, reaching, and bending.
- Ability to frequently lift and carry up to 10 lbs. and occasionally lift and carry up to lifting up to 30 pounds.
- Has manual dexterity sufficient to operate keyboards and other office equipment.
- Ability to perform repetitive work and think critically.
- Associate's degree preferred; high school diploma or equivalence required.
- Experience in a health and human services field with specialized training/experience in the area of mental health preferred.

General Competencies:

Core Competencies:

Physical Requirements:

Qualifications:



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- Experience working with clients, support groups, business development representatives, community providers, and referral sources required.
 - One to three years of health information management experience (i.e., EHR or paper medical record system) in an inpatient or outpatient psychiatric program or acute hospital setting.
 - Credentialed as a Registered Health Information Technician (RHIT) or Registered Health Information Administrator (RHIA), through American Health Information Association (AHIMA) or completion of an approved Health Information/Medical Record Certificate Program preferred.
- Certifications:**
- Current American Heart Association or American Red Cross Basic Life Support (BLS) certification or ability to obtain certification before start date and must maintain current certification throughout employment.
 - Current American Heart Association or American Red Cross First Aid certification or ability to obtain certification before start date and must maintain current certification throughout employment.
 - Current Crisis Prevention Institute (CPI)/Verbal De-Escalation training/certification or ability to obtain certification within 30 days of start date and must maintain current certification throughout employment.
- Additional Requirements:**
- Current physical exam, PPD/TB screening and other immunizations as required.
 - If in recovery, a minimum of two years of sobriety.
 - Duties and responsibilities may be added, deleted, and/or changed at the discretion of supervisor.
- Protected Health Information:**
- Complies with HIPPA and CFR 42 Part 2 rules and regulations.
 - Utilizes the Minimum Necessary Standard when (1) accessing PHI in the performance of job duties; and/or (2) disclosing PHI for treatment, payment, and/or operations purposes.
 - Verbal, written, and electronic PHI access has been determined based on position level and responsibility within HopeWay.
 - Electronic PHI access has been determined as described above and is controlled via unique user login and password.

The above statements are intended to describe the general nature and level of work being performed by staff assigned to this job classification. They are not to be construed as an all-inclusive list of all duties, skills, and responsibilities of staff so assigned.

Employee Signature

Date

Employee Printed Name

Director of Human Resources Signature

Date

Director of Human Resources Printed Name

HopeWay is an Equal Opportunity Employer