

**MEDICAL RECORDS MANAGER
COMPETENCY PROFILE**

Description of Work:

Positions in this banded class manage a medical record program by establishing and maintaining a system for organizing health information. Duties performed include: directing data collection and entry activities; ensuring quality control; providing data analysis and statistics; coordinating retention and disposition of records; and processing data/information requests. Work includes training and supervising others.

| ROLE DESCRIPTIONS BY COMPETENCY LEVEL | | |
|---|---|---|
| Contributing | Journey | Advanced |
| <p>Employees at this level have responsibility for the maintenance, quality control, collection of statistical data, and quantitative analysis of medical record activities. Work includes performance of technical records functions and may include supervision of clerical staff. Employees at this level may serve as consultants to professional staff and management in medical record matters.</p> | <p>Employees at this level have responsibility for the analysis of statistical data developed from medical records and for monitoring the release of information program. They assist in the development of policies relative to utilization review, record procedures and systems, information release, and accreditation. Employees at this level may have responsibility for specific studies in program evaluation. They have full management and budgetary responsibility.</p> | <p>Employees at this level play a key role in planning for and ensuring accreditation, licensure, and certification. They have responsibility for human resources management and budget preparation and management.</p> |

Note: Competency statements are progressive and not all competencies apply to every position/employee. Evaluate only those that apply. For positions with some supervision consider the highest level of professional work performed.

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| Competency | Definition |
|---|--|
| Knowledge - Professional | Possession of a designated level of professional skill and/or knowledge in specific area(s) and to keep current with developments and trends in area(s) of expertise, usually acquired through post-secondary education. |
| Information/Records Administration | Ability to apply appropriate data collection policy and procedures, filing systems, data management systems, and programs. Ability to compile, assimilate, organize, and store printed and electronic information. Ability to review, compile and analyze information to prepare reports. |
| Managing Work and Performance | Ability to assign work and to establish work rules and acceptable levels of quality and quantity or work. Ability to review work and evaluate performance of others, and to develop individuals' competencies. |
| Human Resources Management | Knowledge of appropriate policies and procedures for recruiting, selecting, developing, counseling, disciplining, and evaluation performance of employees to retain a diverse workforce. Ability to administer and ensure compliance with human resources policies and procedures. Ability to observe and assess work. Ability to provide feedback. Ability to provide technical supervision of staff. Ability to develop plans for employees to gain necessary knowledge, skills, and abilities. Ability to plan for and support employees in career development opportunities. |
| Budgeting | Plans and monitors the use of expenditures to meet organizational objectives and compliance; prepares budget documents and reports. |

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Knowledge - Professional

Possession of a designated level of professional skill and/or knowledge in specific area(s) and to keep current with developments and trends in area(s) of expertise, usually acquired through post-secondary education.

| Contributing | Journey | Advanced |
|---|--|---|
| 1. Applies basic knowledge of principles and practices of medical record science. | 1. Applies full knowledge of principles and practices of medical record science. | 1. Applies extensive knowledge of principles and practices of medical record science. |
| 2. Applies basic knowledge of medical terminology and medical coding standards. | 2. Applies full knowledge of medical terminology and medical coding standards. | 2. Applies extensive knowledge of medical terminology and medical coding standards. |
| 3. Applies basic knowledge of North Carolina laws, pertinent federal, State, and local regulations governing records and reports of medical care, vital statistics, and diseases including the Health Insurance Portability and Accountability Act (HIPAA). | 3. Applies full knowledge of North Carolina laws, pertinent federal, State, and local regulations governing records and reports of medical care, vital statistics, and diseases including the Health Insurance Portability and Accountability Act (HIPAA). | 3. Applies extensive knowledge of North Carolina laws, pertinent federal, State, and local regulations governing records and reports of medical care, vital statistics, and diseases including the Health Insurance Portability and Accountability Act (HIPAA). |
| 4. Applies basic knowledge of health information technology including electronic medical record systems and health information data management systems. | 4. Applies full knowledge of health information technology including electronic medical record systems and health information data management systems. | 4. Applies extensive knowledge of health information technology including electronic medical record systems and health information data management systems. |

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Information/Record Administration

Ability to apply appropriate data collection policy and procedures, filing systems, data management systems, and programs. Ability to compile, assimilate, organize, and store printed and electronic information. Ability to review, compile and analyze information to prepare reports.

| Contributing | Journey | Advanced |
|--|---|--|
| 1. Performs daily record keeping procedures; provides consultation to others. | 1. Consults with clinical/ professional staff regarding medical record questions and/or problems; assists in development of new health information systems. | 1. Participates in development of clinical data processing systems; develops and implements new health information systems. |
| 2. Performs quantitative reviews and audits. | 2. Assists in development and implementation of audit procedures. | 2. Develops and implements audit procedures. |
| 3. Collects and maintains basic statistics; prepares and analyzes some data; prepares non-routine data for analysis. | 3. Prepares and analyzes a variety of data; assists clinical/professional staff in design of studies and necessary data collection methods; provides data for surveys and various licensing and accrediting agencies. | 3. Performs analysis of complex data; oversees preparation of data for surveys and various licensing and accrediting agencies. |
| 4. Processes requests for information following regulations and policies including subpoenas and depositions. | 4. Processes special requests for information; recommends revisions to information release policies; attends court and/or depositions responding to requests for information. | 4. Revises information release policies. |

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Managing Work and Performance

Ability to assign work and to establish work rules and acceptable levels of quality and quantity of work. Ability to review work and evaluate performance of others, and to develop individuals' competencies.

| Contributing | Journey | Advanced |
|--|--|---|
| 1. Assigns and maintains workload balance to enhance productivity; reviews work of others; reviews effectiveness of procedures and workflow. | 1. Establishes new procedures and workflows; coordinates work with other medical services. | 1. Assesses long term needs; makes changes in procedures, workflow and assignments. |
| 2. Understands and complies with quality control procedures. | 2. Evaluates and modifies quality control procedures; develops new techniques for quality record systems. | 2. Assists in developing and monitoring the quality control program. |
| 3. Provides training for others. | 3. Designs and plans for training. | 3. Determines training needs; develops training programs. Evaluates and counsels others on training skills and techniques. |
| 4. Researches and recommends new procedures and systems. | 4. Evaluates the feasibility of new procedures and systems; recommends establishment and modification of procedures. | 4. Plans for and implements new procedures and systems; participates in long range planning and organizational problem-solving. |

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Human Resources Management

Knowledge of appropriate policies and procedures for recruiting, selecting, developing, counseling, disciplining, and evaluation performance of employees to retain a diverse workforce. Ability to administer and ensure compliance with human resources policies and procedures. Ability to observe and assess work. Ability to provide feedback. Ability to provide technical supervision of staff. Ability to develop plans for employees to gain necessary knowledge, skills, and abilities. Ability to plan for and support employees in career development opportunities.

| Contributing | Journey | Advanced |
|--|---|--|
| 1. Develops and implements work plans; may conduct performance reviews; participates in the disciplinary and grievance processes, as needed. | 1. Conducts performance reviews; recommends resolution of disciplinary and grievance issues, as needed. | 1. Ensures compliance with performance management policies and procedures; resolves disciplinary and grievance issues. |
| 2. Assists in the recruitment and selection process. | 2. Recruits and selects employees. | 2. Plans and implements recruiting strategies. |
| 3. Identifies and recommends career development opportunities with employees. | 3. Ensures employees have access to tools and information for career development opportunities. | 3. Plans and coordinates career development opportunities. |
| 4. Ensures human resources policies and related information is shared with employees. | 4. Reviews and approves routine human resources policies questions and requests. | 4. Ensures compliance with human resources policies and procedures. |

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Budgeting

Plans and monitors the use of expenditures to meet organizational objectives and compliance; prepares budget documents and reports.

| Contributing | Journey | Advanced |
|---|--|--|
| 1. Operates within assigned budget; tracks expenditures; identifies potential cost savings. | 1. Monitors expenditures and identifies potential budget issues; recommends needed expenditures and revisions to the budget; assesses staffing needs and makes recommendations to senior management. | 1. Researches, recommends, and approves major expenditures; prepares budget. |

Recommended Minimum Training Guideline:

Graduation from a four-year college or university with a major in medical record science or medical record administration; or graduation from a recognized medical record technician program and two years of experience in medical record work; or an equivalent combination of training and experience.

Special Note: This is a generalized representation of positions in this class and is not intended to identify essential work functions per ADA. Examples of competencies are primarily those of the majority of positions in this class, but may not be applicable to all positions.