EL DORADO COMMUNITY HEALTH CENTERS

JOB DESCRIPTION

JOB TITLE: Medical Records Coordinator

REPORT TO: Chief Compliance Officer

DIRECT REPORTS: None

JOB SUMMARY: Under the direct supervision of the Chief Compliance Officer, the Medical Records Coordinator is responsible for processing patient documents and medical records requests, accurately and in a timely manner. Responsible for patient chart abstraction and transferring historical patient information into the appropriate section of the electronic medical record. This role also ensures that records are released appropriately and that health record documentation is managed with the highest level of integrity and compliance.

JOB DUTIES AND RESPONSIBILITIES

A. Records Management

1. Maintain and organize patient health records in the Electronic Health Record (EHR) system according to EDCHC procedures and regulatory requirements.
2. Process incoming health records accurately and in a timely manner, following established procedures and workflows, including but not limited to: eClinicalWorks (eCW) fax inbox, P2P (provider to provider), eConsults, USPS mail and EDCHC interoffice mail, and patient paperwork.
3. Manage electronic and paper health records to ensure all documents are properly indexed, digitized, stored securely, and disposed of appropriately.
4. Follow EDCHC's records retention and destruction schedule, ensuring it meets California requirements (minimum 7 years from last date of service for adults; until 1 year after the patient turns 18, but not less than 7 years, for minors).
5. Coordinate the retrieval of health records needed for patient care, quality assurance, compliance, and administrative purposes.
6. Maintain the paper charts storage list in the Medical Records drive. Retrieve patient charts from storage when necessary. Purge Medical Records annually per EDCHC procedure.
7. Inactivate patient charts monthly per EDCHC procedure.
8. Review sent faxes through eCW Fax Outbox for completion.

B. Release of Records (ROR)

1. Process incoming and outgoing health record requests, ensuring the timely, accurate, and secure release of information.
2. Meet California turnaround requirements for record requests under Health & Safety Code §123110 (e.g., permit inspection within 5 business days; provide copies within 15 days, or 30 days for requests supporting public benefits claims).
3. Verify patient identity and obtain appropriate authorizations before releasing records.
4. Support the copy service in following workflows to ensure accurate, secure, and

timely reproduction and release of records; communicate with vendors or internal staff as needed.

5. Track all qualifying disclosures in Accounting of Disclosures Log including: date of release, who received the health records, a brief description of what was disclosed, and why.

C. Support & Collaboration

1. Support healthcare staff in proper documentation, record-keeping, and health information management procedures.
2. Assist and support co-workers when needed. Help patients and EDCHC employees with all tasks and questions regarding EDCHC's health records.
3. Alert the Chief Compliance Officer of possible problems concerning patient relations, patient data, and other functions of the clinic. Complete incident reports as required.
4. Collaborate with the Health Information Technology (HIT) team and other departments on special projects and initiatives aligned with organizational goals.

D. Compliance, Privacy, and Safety

1. Ensure the confidentiality, security, and proper management of health records in accordance with HIPAA, federal and state laws, and organizational policies.
2. Apply California's Confidentiality of Medical Information Act (Civil Code §56 et seq.) alongside HIPAA, including additional consent requirements for behavioral health/substance use disorder records (42 CFR Part 2) and minors' confidential services.
3. Release records consistent with the Information Blocking Rule (21st Century Cures Act), applying only permitted exceptions rather than withholding records by default.
4. Adhere to all safety procedures and report unsafe conditions to maintain an injury-free work environment.
5. Use appropriate ergonomic measures to reduce the risk of work-related injuries.

E. Other Duties

1. Perform other duties as assigned.

ADDITIONAL DUTIES AND RESPONSIBILITIES OF LEVEL 3 MEDICAL RECORD COORDINATORS

Duties are assigned from the categories below based on the needs of the department. Level 3 Medical Record Coordinators are expected to have the knowledge and skills to complete all of the below duties:

1. Training: Develop and maintain a comprehensive training plan for medical records staff and the copy service, ensuring staff are trained on workflows, procedures, and policies. Provide new hire training and ongoing guidance so staff maintain competency, provide medical records training to Medical Assistant and Front Office new hires after they have completed their first 90 days of employment, and train other teams or departments as needed.

2. Lead-Level Support: Serve as a resource to Level 1 and Level 2 Medical Records Coordinators, answering questions and providing guidance on workflows and procedures.
3. Workflow Development and Optimization: Create, review, and revise learning guides and workflows to ensure processes are accurate, efficient, and compliant, and identify and lead process improvement initiatives. Identify areas for improvement, collaborate with stakeholders on solutions, present proposals for approval, and assist with implementation of approved learning guides and workflows.
4. EHR Superuser: Act as the primary Electronic Health Record (EHR) superuser for the medical records team. Provide advanced support, troubleshooting, and guidance for electronic health record functionality, and provide training to enable staff to use the system effectively.
5. Representation and Collaboration: Serve as the Medical Records team liaison in cross-departmental meetings and initiatives. Collaborate with other departments to design workflows that are efficient and effective, ensuring documentation is clear and staff are trained appropriately.
6. Medical Records Metrics and Reporting: Generate and maintain operational reports and key metrics to support medical records performance and organizational operations.
7. Accounting of Disclosures: Ensure medical records staff track all unusual disclosures on the Accounting of Disclosures Log and maintain that log. Respond to patient accounting-of-disclosures requests in accordance with HIPAA (45 CFR §164.528).
8. Copy Service Coordination: Serve as the primary point of contact and liaison for the copy service. Address escalated issues, guide workflow adherence, and coordinate solutions with internal staff or vendors to ensure timely, accurate, and secure processing.
9. Subpoena Processing: Ensure all subpoenas are logged, tracked, reviewed for completeness, and contain proper authorizations prior to being signed by the Chief Compliance Officer, and ensure they are processed in a timely manner in adherence with California and federal laws and regulations.
10. Unusual Records and External Peer Review Requests: Receive and process all unusual records requests as defined by California and federal law, ensuring all required information is documented in the Accounting of Disclosures Log, including the date of release, who received the health records, a brief description of what was disclosed, and why. Receive and process all external peer review requests and ensure timely delivery to the external peer review company.
11. Organization Mail Services: Ensure the continuity of mail operations across EDCHC facilities by assisting with all mail collection, transportation, and distribution to ensure timely pickup and delivery of incoming and interoffice mail, including delivery of certified mail to the post office as necessary.

KNOWLEDGE, SKILLS AND ABILITIES

- Knowledge of:
    - Healthcare Regulations: Understanding of HIPAA, privacy laws, and healthcare regulations related to health records management.
    - Electronic Health Records: Knowledge of EHR systems, including eClinicalWorks

(eCW), and their functionality for organizing, updating, and maintaining patient records.

- Medical Terminology: Familiarity with medical terminology, procedures, diagnoses, and abbreviations to accurately manage and process health records.
- Clinic Policies and Procedures: Familiarity with clinic policies and procedures.

- Skills in:
  - Communication: Strong verbal and written communication skills to interact with patients, staff, and community partners.
  - Organization: Maintain health records and data systematically organized, both digitally and physically.
  - Problem Solving: Skills in identifying issues related to record management, such as data discrepancies, and resolving them effectively.
  - Customer Service: Provide excellent customer service, handling inquiries and requests with professionalism and care while fostering a positive and supportive environment for both external and internal customers.
  - Data Entry: Proficiency in entering, updating, and maintaining patient information with high accuracy.
  - Technical Proficiency: Competency in using health information systems, EHR platforms (eCW preferred), and other medical software.
  - Time Management: Efficiently manage time to meet deadlines and handle multiple tasks simultaneously.
- Ability to:
  - EDCHC Mission: Demonstrate a commitment to EDCHC's mission of “Improving the health of our community through quality healing and preventive services.”
  - EDCHC Core Values: Constantly apply EDCHC's core values by serving each other, appreciating everyone, being inclusive, staying positive, and striving to do your best in all interactions. Actively contributes to fostering an environment where these values are practiced daily to enhance workplace culture and patient care.
  - Attention to Detail: Thoroughly review and ensure the accuracy and completeness of patient records.
  - Confidentiality: Maintain confidentiality and security of sensitive patient information in all circumstances.
  - Adaptability: Adjust to changes in healthcare regulations, technology, and/or workplace processes.
  - Team Collaboration: Work professionally within a healthcare team, including

interacting with providers and administrative staff.

- Cultural Competency: Develop rapport and work with people of all ages, cultural, religious, social, and ethnic backgrounds.
- Critical Thinking and Decision-Making: Think critically and make sound decisions based on procedures and available information.
- Prioritization: Effectively prioritize tasks and responsibilities to ensure that the most important tasks are completed efficiently and on time.
- Work in a Fast-Paced Environment: Capable of working efficiently in a dynamic environment with frequent interruptions, maintaining focus on essential tasks, and adapting quickly to changing priorities.

ADDITIONAL KNOWLEDGE, SKILLS, AND ABILITIES OF LEVEL 3 MEDICAL RECORDS COORDINATORS

1. Systems, Workflow, and Process Improvement
2. Workflow Development and Optimization: Identify workflow issues, collaborate on solutions, present recommendations for approval, and assist in implementing approved processes. Understand principles of process improvement and efficiency.
3. Analytical and Problem-Solving Skills: Analyze processes and data to identify inefficiencies or gaps. Collaborate on practical solutions and support implementation of approved improvements.
4. Project Coordination: Manage multiple projects, ensuring timely completion and alignment with organizational priorities. Focus on planning, coordination, and follow-through without direct supervision of staff.
5. Advanced Electronic Health Record Proficiency: Demonstrate advanced working knowledge of the EHR, including eClinicalWorks (eCW), sufficient to troubleshoot, support, and train other staff and to generate operational reports and metrics.
6. Legal and Regulatory Compliance: Apply working knowledge of California and federal laws governing subpoena processing, unusual records requests, and external peer review requests, ensuring proper authorization, timely response, and compliant handling of sensitive requests.
7. Vendor and Escalation Management: Serve as the point of contact for copy service issues, resolving escalated concerns and coordinating with internal staff and external vendors to ensure secure, accurate, and timely processing.
8. Operational and Logistics Coordination: Coordinate mail collection, transport, and distribution across multiple facilities, ensuring continuity of operations and timely, secure delivery of incoming, interoffice, and certified mail.

QUALIFICATIONS

To qualify for this position, an individual must possess any combination equivalent to sufficient experience and/or education that would likely produce the required knowledge, skill, and ability requirements listed above. A typical way to acquire the required

qualifications would be:

Experience:

Levels 1 and 2:
A minimum of two years of experience working in the healthcare field with a focus on health records management preferred.

Level 3:
A minimum of two years of experience working in the healthcare field and at least two years of health records management experience with EDCHC.

Education and Certification for Levels 1 – 3:

High School Diploma
Medical Records Certificate (CEHRS, RHIT) desired

OTHER
Physical Requirements:

Normal health center / interior office environment: see, hear, talk, walk or move about, sit and/or stand for long periods of time, reach, stoop, bend, lift up to 50 lb.; repetitive hand movement; use and view a computer; use a calculator, operate copier, telephone; read and write English.

FLSA Status: Non-exempt

Note: The above statements are intended to describe the general nature and level of work being performed by persons assigned to this job. They are not intended to be an inclusive list of all duties, responsibilities and skills required of incumbents. In accordance with the Americans with Disability Act, reasonable accommodation may be made to enable qualified individuals with disabilities to perform the essential job functions.

Salary: $23.89 - $29.98