



Employee Job Description		
<b>Position Title:</b> Medical Records Technician		
<b>Position ID #</b>		
<b>Facility:</b> St. Croix Tribal Health and Human Services		
<b>Job Family:</b> St. Croix Tribal Health Clinic	<b>Comp Grade:</b>	<b>Status:</b> Full-Time

**St. Croix Chippewa Indians of Wisconsin Leadership will strive to uphold the mission, vision, and values of the organization. They will serve as role models for staff and act in a people centered, service excellence-focused and results oriented manner.**

### **POSITION SUMMARY**

The Medical Records Technician ensures the accuracy, timeliness, completeness, consistency, security, and confidentiality of medical records in compliance with standards set by the Centers for Medicare and Medicaid (CMS), third-party payers, accrediting bodies, and state and federal privacy regulations such HIPAA and 42 CFR Part 2. Responsibilities include scanning documents, conducting chart audits, merging duplicate patient charts, managing internal and external referrals, processing release of information (ROI) requests, patient portal support, and organizing medical records. This role is vital for regulatory compliance, safeguarding patient privacy, and providing clinical and administrative staff with timely, accurate information.

### **JOB DUTIES**

#### **Scanning:**

- Accurately and efficiently scans internal and external documents into the Electronic Health Record Document Management system.
- Ensures that scanned documents are accurately indexed by document type and category, and properly filed within the appropriate patient chart, making them easily accessible for future retrieval.
- Verifies the legibility, accuracy and completeness of scanned documents.

#### **Chart Auditing**

- Conducts regular chart audits to verify the accuracy, completeness, and consistency of patient medical records.
- Ensure compliance with healthcare documentation standards, including accuracy, timeliness, completeness, legibility, authentication, consistency and privacy and confidentiality.
- Tracks documentation deficiencies and communicates with providers and supervisory personnel for correction, tracking outstanding issues to ensure timely resolution.

#### **Referrals and Prior Authorizations:**

- Receives and documents and processes internal and external patient referrals per facility policy and procedure.

- Ensures that all referrals contain all necessary information to facilitate coordination of care between internal departments and external facilities.
- Requests, tracks, and secures prior authorization from insurance carriers before processing referrals and scheduling medical services.
- Follows up with external facilities and patients to confirm referral receipt and ensure continuity of care.
- Requests results from external providers and scans them into the EHR Document Management system for internal provider review, ensuring the completion of the referral loop and continuity of patient care.
- Tracks, logs, and follows up on all referrals on a daily, weekly, and monthly basis.
- Communicates any insurance changes or trends among healthcare team.
- Clearly and accurately documents all communications and interactions related to referrals with providers and personnel in the EHR, ensuring compliance with standardized documentation protocols.

**Release of Information:**

- Serves as a main point of contact for patients, attorneys, and third-party entities requesting medical records.
- Evaluates and verifies requests for medical records from patients, healthcare providers, insurance companies, legal representatives, and other authorized entities.
- Ensures all requests comply with state and federal laws (e.g., HIPAA, 45 CFR Part 2, WI Statute 146) as well as organizational policies, processing them promptly and with precision.
- Ensures proper patient consent and authorization are obtained when necessary.
- Documents all release of information activities, including details of the request, the information provided, and date of the release. Maintains an audit trail within the EHR to ensure accountability and to meet regulatory and organizational requirements.
- Requests and scans outside medical records into the patient's EHR to ensure continuity of care and accessibility for ongoing treatment.
- Maintains knowledge of changes in regulations governing the release of information and participates in ongoing training to ensure the organization's practices remain compliant with current state and federal regulations.

**Patient Portal Support:**

- Assists patients with accessing, navigating, and troubleshooting issues within the patient portal to enhance user experience and accessibility.
- Routes patient messages to the appropriate providers or departments within the portal, ensuring prompt and accurate responses.
- Facilitates the secure release of medical records via the portal, verifying compliance with state and federal privacy laws.
- Monitors system functionality, reporting any issues to EHR Administrator/Vendor to maintain a seamless user experience.
- Educates patients on portal features, supporting patient engagement and autonomy in managing their health records.
- Manages and updates forms, health education materials, and FAQs in the portal, keeping content up-to-date and relevant.

**Patient Registration:**

- This position could be cross trained to cover the front desk registration, which includes but is not limited to:

- Answering phone calls, taking messages and forwarding calls in a timely manner.
- Greeting patients and visitors as they enter the clinic.
- Checking in patients for appointments upon arrival.
- Gathering, updating and maintaining patient demographic information.

**Note:** The essential functions are intended to describe the general contents of and requirements of this position and are not intended to be an exhaustive statement of duties. Specific tasks or responsibilities will be documented as outlined by the incumbent's immediate manager.

**Type of Supervisory Responsibilities:** N/A

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**Directly Reporting to:** Business Office Manager

**Matrix of INDIRECT Reporting:** St. Croix Tribal Council

**Scope and Complexity:**

Interacts with all levels of management and employees, while maintaining confidentiality and relaying highly sensitive information and appropriate application of business operations and practices.

**Physical Demands/Environment Factors: OE-Typical Office Environment:**

- Requires extensive sitting with periodic standing and walking.
- Requires significant use of personal computer, phone and general office equipment.
- Needs adequate visual acuity, ability to grasp and handle objects.
- Need ability to communicate effectively through reading, writing, and speaking in person or on the telephone.
- May require off-site travel.

**SKILLS AND QUALIFICATIONS:**

- **Education:** High school diploma or equivalent required.
  - **Preferred:** Associate's Degree in Health Information Technology, Health Information Management, or a related field.
- **Experience:** At least two years of experience in a medical office, medical records, or health information environment, or completion of a two-year Health Information Technology program.
- **Certifications:**
  - Registered Health Information Technician (RHIT) certification preferred but not required.
- **Skills and Knowledge:**
  - Basic understanding of information privacy laws, release of information procedures, and access control principles.
  - Strong organizational skills, with the ability to prioritize and complete tasks independently and collaboratively.
  - Effective verbal and written communication skills to interact professionally with patients and staff.
  - Intermediate proficiency in Microsoft Office applications, including Excel, Word, and Outlook.

- Basic keyboarding skills, with experience navigating multi-technology environments.
- **Confidentiality:**
  - Commitment to maintaining patient confidentiality in compliance with HIPAA and other applicable privacy laws.
- **Customer Service:** Excellent customer service skills, with the ability to communicate clearly, concisely, and professionally.

*Native American Preference Given in Accordance with P.L. 93-638 and Amendments*

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EEPID	Employee Printed Name	Employee Signature	Date
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Supervisor Printed Name	Supervisor Signature	Date
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*\*These are expected to be updated regularly as responsibilities come and go and will be used to notify employee annually. All signatures are required.*