



United States  
Office of Personnel Management

# Medical Clerk Series

**GS-0679**

**Apr 1978, TS-30 May 1979, TS-35**

## **Additional Available Guidance**

See [Digest of Significant Classification Decisions & Opinions, Vol. 7](#) for guidance on crediting Factor Level 9-3 to Medical Clerk positions.

**Workforce Compensation and Performance Service  
Office of Performance and Compensation System Design  
Classification Programs Division  
July 1999, HRCDD-7**

[Main Menu](#)   [Exit](#)

# Medical Clerk Series

GS-0679

## CONTENTS

SERIES DEFINITION .....	1
EXCLUSIONS .....	1
OCCUPATIONAL INFORMATION .....	1
TITLES .....	2
EVALUATION OF POSITIONS .....	3
GRADE CONVERSION TABLE .....	4
FACTOR LEVEL DESCRIPTIONS .....	4
FACTOR 1, KNOWLEDGE REQUIRED BY THE POSITION .....	4
FACTOR 2, SUPERVISORY CONTROLS .....	6
FACTOR 3, GUIDELINES .....	6
FACTOR 4, COMPLEXITY .....	7
FACTOR 5, SCOPE AND EFFECT .....	7
FACTOR 6, PERSONAL CONTACTS .....	8
FACTOR 7, PURPOSE OF CONTACTS .....	8
FACTOR 8, PHYSICAL DEMANDS .....	9
FACTOR 9, WORK ENVIRONMENT .....	9
OPM BENCHMARK DESCRIPTIONS .....	10
MEDICAL CLERK, GS-0679-02, BMK # 1 .....	10
MEDICAL CLERK (TYPING), GS-0679-03, BMK # 1 .....	12
MEDICAL CLERK (TYPING), GS-0679-03, BMK #2 .....	15
MEDICAL CLERK, GS-0679-03, BMK #3 .....	18
MEDICAL CLERK, GS-0679-03, BMK # 4 .....	20
MEDICAL CLERK (TYPING), GS-0679-04, BMK #1 .....	23
MEDICAL CLERK (TYPING), GS-0679-04, BMK #2 .....	26
MEDICAL CLERK (TYPING), GS-0679-04, BMK #3 .....	30
MEDICAL CLERK, GS-0679-04, BMK #4 .....	33
MEDICAL CLERK (TYPING), GS-0679-04, BMK #5 .....	36

## SERIES DEFINITION

This series includes all positions the primary duties of which are to perform clerical work in support of the care and treatment given to patients in a ward, clinic or other such unit of a medical facility. This work includes functions such as serving as receptionist; performing recordkeeping duties; performing clerical duties relating to patient care and treatment; and providing miscellaneous support to the medical staff of the unit. This work requires a practical knowledge of the medical facility's organization and services, the basic rules and regulations governing visitors and patient treatment and a practical knowledge of the standard procedures, medical records and medical terminology of the unit supported.

## EXCLUSIONS

The following kinds of positions are excluded from this series:

1. Positions which require a fully qualified typist or stenographer and also involve the performance of general office clerical work (such as answering the telephone, filing, opening and distributing mail, etc.), but do not require knowledge of rules, processes, records and terminology relative to the care and treatment of patients. Such positions are classified in the [Clerk-Stenographer and Reporter Series, GS-0312](#), or the [Clerk-Typist Series, GS-0322](#).
2. Positions involving clerical and administrative duties performed auxiliary to the work of others and defined as a secretary position in the classification standard for the [Secretary Series, GS-0318](#).
3. Positions which primarily involve a variety of personal care, nursing care, or technical procedures related to the administration of direct care. Such positions are classified to the [Nursing Assistant Series, GS-0621](#).
4. Positions which primarily involve the analysis of medical records for consistency and compliance with requirements and the associated coding and retrieving of data. Such positions are classified in the [Medical Record Technician Series, GS-0675](#).
5. Positions which primarily involve giving general information in person or by telephone concerning the organization, functions, activities and personnel of such agencies, units, or offices and do not require an identifiable subject matter knowledge. These positions are classified to the [Information Receptionist Series, GS-0304](#).

## OCCUPATIONAL INFORMATION

Medical Clerks perform a variety of clerical support duties which facilitate the work of physicians, nurses, nursing assistants and other members of the medical facility unit who provide patient care. They frequently occupy the single clerical support position located in one or more units and link

the nursing service with the medical administrative services and outpatient departments. Medical Clerks are considered chief sources of information and play an important role in efficiently accomplishing the work of the unit.

Typical Medical Clerk responsibilities and duties include:

1. Serving as receptionist:

- Receives and relays incoming and outgoing telephone and intercom messages.
- Receives and directs patients and visitors, answers routine inquiries and makes appropriate referral of questions concerning patient's condition.

2. Performing recordkeeping duties:

- Assembles patient records according to prescribed format.
- Inserts additional forms in chart as necessary and stamps with correct patient identification.
- Files results of treatment in medical records.
- Reviews charts of patients and records a variety of medical data.

PAGE 3 4/78 TS-30

3. Performing clerical duties relating to patient care and treatment:

- Determines patients' eligibility for treatment and paid travel expenses.
- Records physicians' orders for patients on a variety of records.
- Charts temperatures, blood pressures, respirations and other medical data.
- Selects, completes and routes requests for patient activities and treatment procedures.
- Enters test results on patient records.
- Schedules appointments for patients with other medical services.

4. Performing miscellaneous duties:

- Prepares patient census reports.
- Maintains bulletin boards and library references.
- Keeps time and attendance records.
- Maintains a variety of information files.
- Orders and keeps record of supplies.
- Receives and distributes mail to medical staff and patients.

## TITLES

The appropriate title for all positions in this series is Medical Clerk. A parenthetical title, e.g., Medical Clerk (Typing), should be added showing a requirement for typing or stenographical skill only when the requirement for the skill is as high as that required under the competitive standard

for that skill. In all cases in which a parenthetical title is used, the position description must reflect the duties which necessitated the use of that title.

PAGE 4 4/78 TS-30

The parenthetical title should not be used when the skill is so infrequent or performed under such circumstances that most or all people who can perform the clerical work satisfactorily can also accomplish the skill in a reasonably adequate manner either immediately upon employment, after a reasonable period of experience on the job or by some other technique or device to accomplish that work.

Typically, supervision is exercised by supervisory nurses or members of the medical administration. However, the word "supervisory" is prefixed to Medical Clerk positions when supervisory duties and responsibilities constitute a substantial, regular part of the position, and meet the definition and criteria for supervisory positions contained in the [General Schedule Supervisory Guide](#).

The work "Lead" is prefixed to the title of Medical Clerk when the duties and responsibilities of the position meet the criteria for a work leader as defined in the [Work Leader Grade-Evaluation Guide](#).

## EVALUATION OF POSITIONS

Positions which involve the performance of medical clerk duties and in addition, as the primary responsibility of their assignment, lead three or more employees in accomplishing the medical clerk duties, are evaluated by reference to the [Work Leader Grade Evaluation Guide](#).

Supervisory positions are evaluated by reference to the [General Schedule Supervisory Guide](#).

Nonsupervisory positions should be evaluated on a factor-by-factor basis using one or more of the following factor level descriptions and Civil Service Commission benchmark descriptions for Medical Clerks, GS-2, 3, 4. The fact that a benchmark description is not provided at a certain grade level does not prevent placing a position at that grade. Factors in individual positions which cannot be matched to factors in the benchmark descriptions are point rated by use of the factor level descriptions for the Medical Clerk Series.

The factor level descriptions and benchmark positions descriptions provide grading criteria based on a mix of characteristics common to Medical Clerk positions in various kinds of medical facilities. Characteristics such as the following do *not carry grade level* significance:

PAGE 5 4/78 TS-30

1. The secondary mission of the medical facility (e.g., research or teaching) which may have an influence on the need for accuracy in the work, volume of work, and turnover rate of patients and/or employees in the unit.

2. The use of an automated information systems terminal which increases the speed and efficiency of clerical processes related to patient care, but generally does not require higher level knowledges, skills and abilities in order to perform the work.
3. Personal characteristics (e.g., tact, dependability, honesty). Those are considered necessary to the proper performance of the work and are characteristics important in the recruitment process and the evaluation of employee performance, but do not in themselves affect the grade level.

### **GRADE CONVERSION TABLE**

Total points on all evaluation factors are converted to GS grade as follows:

<b>GS Grade</b>	<b>Point Range</b>
1	190-250
2	255-450
3	455-650
4	655-850
5	855-1100

PAGE 6 4/78 TS-30

### **FACTOR LEVEL DESCRIPTIONS**

#### **FACTOR 1, KNOWLEDGE REQUIRED BY THE POSITION**

*Level 1-1 -- 50 points*

- Knowledge of elementary unit procedures for receiving, transferring and discharging patients involving such things as greeting the patient, checking patient's identification, notifying professional staff of arrival or discharge, directing patients to rooms, giving general hospital information to patients and recording admission, transfer or discharge on census forms and other necessary forms.
- Knowledge of such things as the general rules and function of the various departments of the medical facility; knowledge of forms used for such things as ordering and recording supplies, equipment, and filing medical records, typically requiring the ability to follow specific, readily comprehensible instructions.
- Knowledge of uncomplicated filing systems to file such material as patient charts, locator cards and reference materials in alphabetical order.
- Skill in the operation of non-complex equipment typically including an intercom and addressograph machine.

*Level 1-2 -- 200 points*

In addition to knowledges at the next lower level:

- Knowledge of the unit procedures for assembling patient charts in their required order and sequence, and for recording a variety of physicians' orders for patient activities, diets, tests, and treatments in order to maintain an accurate and permanent report of patient information.
  - Knowledge of the spelling and meaning of commonly used medical terminology of the unit, (e.g., terms of anatomy, physiology, diseases, tests, etc.), characteristic of a medical, surgical, psychiatric, neurological, cardiovascular or another specialty unit of the medical facility in order to accurately graph and enter specific information onto patient records.
- PAGE 7 4/78 TS-30
- An understanding of materials such as X-ray and laboratory results, records of treatment and medical correspondence sufficient to file according to their subject matter.
  - Knowledge of agency or medical facility regulations to determine eligibility for such services as medical treatment, paid medication, travel expenses, and meals, while patient is receiving treatment.

*Level 1-3 -- 350 points*

In addition to the knowledges at the next lower level:

- Thorough knowledge of procedures for assembling patient charts, recording physicians' orders including orders for drugs, integrating X-ray and test reports in records, graphing and charting medical data, and scheduling patient appointments, in order to relate the clerical functions (e.g., recordkeeping, patient-related, etc.) of the unit to the total patient care process.
- Knowledge of the internal organization of patient records and the relationship of their parts in order to search records and extract medical information and data relevant to the planning of patient treatment and to review records for completeness, accuracy and consistency with medical facility requirements upon the discharge of patient
- Knowledge of the various medical facility units and services, and the medical terminology and procedures common to each unit and service, in order to record and report medical information such as X-ray and test results, to give preparatory instructions to patients for a variety of diagnostic procedures and properly arrange patient appointments to avoid conflicts in patient care care and treatment.

**FACTOR 2, SUPERVISORY CONTROLS**

*Level 2-1 -- 25 points*

The supervisor, typically a higher graded clerk, Charge Nurse, or Chief of Ward Administration, gives assignments consisting of specific tasks, (e.g., a specific recordkeeping or receptionist function), and is readily available for additional guidance.

PAGE 8 4/78 TS-30

The employee works according to detailed instructions and refers problems to the supervisor.

The work receives a close review for full completion of task and for adherence to applicable guidelines and instructions.

*Level 2-2 -- 125 points*

The clerk receives instructions from a higher graded clerk, Charge Nurse, Chief of Outpatient Department or Chief of Ward Administration, on the non-recurring assignments and changes in unit procedures.

Most assignments are performed independently according to established procedures and/or previous experience. The employee refers questions on new situations to the supervisor or another clerk with more experience, (e.g., a question concerning the procedure for ordering a treatment not commonly prescribed for a patient in that unit).

Finished work is generally spot-checked for compliance with the unit procedures and established medical facility requirements for the internal organization of medical records. Completed assignments involving such things as the recording of physicians' orders, reporting of test results, and release of information on patient treatment, are closely reviewed for accuracy by the supervisor.

**FACTOR 3, GUIDELINES***Level 3-1 -- 25 points*

Guidelines are available and specific for most assignments. Typically, they include operations manuals describing formalized procedures and examples of numerous forms in common usage in the unit, manuals applicable to the administrative functions, references listing regular medications, diets, and tests, medical dictionaries, and written and oral directives from the medical staff governing the release of patient information and patient care activities. Guides demand strict adherence and allow little discretion in their application. Deviations from or changes in guidelines are authorized by the supervisor.

*Level 3-2 -- 125 points*



Guidelines consist of numerous written and oral procedural instructions typically regarding the scheduling of patient appointments, eligibility for treatment and paid services such as travel expenses, release of patient information, required preparations and procedures for medical tests, and procedures for requesting, filing and completing medical records of patients. The employee is frequently required to use judgment in applying guidelines to situations such as screening walk-in patients requesting treatment, locating medical records of patients when several locations in the facility are possible, fitting patients requiring immediate medical attention into full appointment schedules, and applying regulations governing patients' eligibility for services when there are discrepancies or omissions in facts about the patient.

PAGE 9 4/78 TS-30

### **FACTOR 4, COMPLEXITY**

#### *Level 4-1 -- 25 points*

Assignments are repetitive and directly related to the reception and recordkeeping processes in the unit. The employee is concerned with the timely completion of easily understood tasks with little variation in the manner in which they are performed.

#### *Level 4-2 -- 75 points*

The work involves several processes such as compiling, recording, reviewing, selecting and interpreting medical data and information incidental to a variety of patient care and treatment activities. Procedures for the performance of work are established. Variations in work result from changing priorities which frequently depend upon the urgency of the situation and the differences in medical information about each patient.

### **FACTOR 5, SCOPE AND EFFECT**

#### *Level 5-1 -- 25 points*

The purpose of the work is to provide clerical support to the unit by performing a variety of recurring receptionist, recordkeeping and miscellaneous functions. Such work may also include the performance of selected duties related to patient care (e.g., graphing temperatures, blood pressures and respirations).

The performance of these routine duties in an efficient and timely manner facilitates the work of the medical staff in providing patient care.

#### *Level 5-2 -- 75 points*

In addition to receptionist and recordkeeping duties, the clerk performs functions such as giving patients correct instructions on test preparations, diets, etc., and properly recording physicians' orders, which may have significant effects on patient care.

PAGE 10 4/78 TS-30

The accurate and proper performance of these duties affects the efficiency, accuracy, and acceptability of further processes or services such as medical tests.

## **FACTOR 6, PERSONAL CONTACTS**

### *Level 6-2 -- 25 points*

Personal contacts include staff members of the unit responsible for administering direct patient care (i.e., physicians, nurses and nursing assistants); patients and their visitors; employees of other medical services (i.e., laboratory, radiology, outpatient services, medical administration); employees of community and social services (such as employees of nursing homes and private hospitals, clergy, law enforcement officials and social workers).

## **FACTOR 7, PURPOSE OF CONTACTS**

### *Level 7-1 -- 20 points*

The purpose of contacts is to give, obtain, clarify or exchange general and medical information concerning the patients in the unit. The information ranges from general admission information (i.e., names, dates and times of arrival) to highly specialized medical information (i.e., test and laboratory results, names of drugs and diseases, physicians' diagnosis and prognosis). Contacts at this level directly relate to the recurring functions of the unit.

### *Level 7-2 -- 50 points*

The purpose is to initiate and follow through on work efforts pertaining to the treatment of patients. Makes arrangements with medical staff and various medical facility departments, clinics or services in preparing schedule of patient appointments. Works cooperatively with medical staff upon discharge of patient to insure data and information in permanent record is accurate, complete, and meets the medical facility requirements. The clerk at this level draws upon considerable experience and tact in relaying instructions to patients to prepare them for medical tests and in making suggestions or providing advice to lower graded clerks concerning changes or problems in unit practices.

### *Level 7-3 -- 120 points*

Contacts are for a purpose similar to that in Level 702 but in addition, the work requires regular and recurring contact with patients who are unusually difficult to communicate with because of their very poor physical condition or acute psychiatric disorder. Patients may be characterized as being easily excitable, irrational, withdrawn, and not easily able to accept or understand instructions. The medical clerk is required to exercise skill in getting information from patients to complete records, in giving instructions for scheduled appointments and therapeutic activities, and relaying physicians' orders for such things as restrictions of personal finances or unit privileges.

PAGE 11 4/78 TS-30

An example of this level is the medical clerk working in a locked psychiatric unit with a variety of severely ill patients, who through frequent contact with the patient must establish a degree of control in gaining patients acceptance of rules and procedures of the unit, and in following physicians' orders for restrictions in patient's activities.

Note: Positions involving contact with psychiatric patients should not be automatically credited at this level. Most medical clerk positions do not have contact with patients of this nature on a regular and recurring basis.

## **FACTOR 8, PHYSICAL DEMANDS**

### *Level 8-1 -- 5 points*

The work is mainly sedentary but requires some bending, walking, standing, and the carrying of such things as patient records, light sterile supplies, and letter mail. Some positions may involve more frequent walking to various locations of the medical facility (e.g., those located in medical facilities without escort service and without automated information systems) but these positions require no unusual physical demands to perform the work.

## **FACTOR 9, WORK ENVIRONMENT**

(See [Digest 7](#) for guidance on assigning Factor Level 9-3 to GS-0679 positions)

### *Level 9-1 -- 5 points*

The work is performed in a detached office setting. The employee has contact with patients typically ambulatory, having long term, chronic conditions, which exposes employee to no unusual risk or discomforts.

### *Level 9-2 -- 20 points*

The work is generally performed in or near the nurses' station on a medical facility unit. The unit environment exposes the employee to such things as communicable diseases, and physical abuse from emotionally disturbed patients and distraught visitors. Safety precautions are necessary.

PAGE 12 4/78 TS-30

## OPM BENCHMARK DESCRIPTIONS

### MEDICAL CLERK, GS-0679-02, BMK # 1

#### *Duties*

Performs a few receptionist and recordkeeping duties in a unit of a medical facility.

- Escorts patients to the assigned room and bed. Provides general information such as visiting hours, smoking, use of the intercom and the services available for personal needs.
- Records patient's admission and discharge on daily roster and enters in logbook various information to identify patients.
- Receives and delivers messages, flowers, and gifts to patients and distributes unit mail.
- Requests patient's previous medical record from hospital file room if the general admission information indicates prior hospital stay. Requests patient's records from other sources as directed by the physician.
- Records the receipt and issuance of sterile supplies and stores for use in the unit. Completes and routes requisition forms for replacement items.
- Returns unused medications to the pharmacy when authorized by Head Nurse.
- Stamps patient identification on medical records using addressograph machine.
- Files in alphabetical order active patient charts. Records charge out, locates and refiles charts as needed.
- Under direct guidance of higher grade clerk performs other recordkeeping duties such as assembling patient's charts, and files laboratory results in proper order, etc.

#### *Factor 1. Knowledge Required by the Position -- Level 1-1 -- 50 points*

- Knowledge of the procedure for receiving and discharging patients in the unit. (50 points)
- Knowledge of the general rules and functions of the various departments of the facility to inform patients and visitors, route requisitions and return unused medications. (50 points)

PAGE 13 4/78 TS-30

- Knowledge of the forms and process for ordering and recording supplies and requesting medical records or equipment. (50 points)
- Knowledge of alphabetical filing. (50 points)
- Skill in operating intercom and addressograph machines. (50 points)

*Factor 2. Supervisory Controls -- Level 2-2 -- 125 points*

General supervision is received from a higher graded clerk, the Charge Nurse, or Chief of Ward Administration who instructs employee on changes in unit procedures. The incumbent performs receptionist and recordkeeping duties independently. Specific guidance in performing clerical tasks related to patient care is received from a more experienced clerk. The work is spot-checked for accurate completion and compliance with unit procedures.

*Factor 3. Guidelines -- Level 3-1 -- 25 points*

Guidelines include manuals stating formalized unit procedures for receiving and discharging patients, specific facility policy regarding the release of patient information, and standardized formats for completing the requests for records and supplies. Directories are also available to direct employees, patients and visitors to various departments and locations. Employee strictly adheres to these guidelines.

*Factor 4. Complexity -- Level 4-1 -- 25 points*

Most of the assignments are directly related to the reception of the patient to the unit or facility and are repeated for each admission. Steps for completing assignments according to written and oral instructions are memorized. There are few variations in the tasks due to the structured nature of the assignments.

*Factor 5. Scope and Effect -- Level 5-1 -- 25 points*

The accurate and timely completion of specific tasks facilitates the work of other staff members in the unit.

PAGE 14 4/78 TS-30

*Factor 6. Personal Contacts -- Level 6-2 -- 25 points*

Contacts are with patients, visitors, staff members of the unit, employees of services within the medical facility and occasionally with employees of other medical facilities.

*Factor 7. Purpose of Contacts -- Level 7-1 -- 20 points*

The purpose of contacts with patients is to give general unit information. Contacts with staff members and employees of other medical services relate directly to the routine receptionist and

recordkeeping functions. Employees of outside facilities are contacted generally to obtain specific information pertinent to a patient's records.

*Factor 8. Physical Demand -- Level 8-1 -- 5 points*

Work requires some walking, standing, sitting, bending and carrying of light items such as patient chart holders, papers, books, and sterile supplies.

*Factor 9. Work Environment -- Level 9-2 -- 20 points*

Working in the medical facility unit exposes the employees to communicable diseases.

**TOTAL POINTS -- 320**

PAGE 15 4/78 TS-30

**MEDICAL CLERK (TYPING), GS-0679-03, BMK # 1**

*Duties*

Performs a variety of receptionist, recordkeeping and miscellaneous duties in an outpatient unit of a general medical and surgical facility.

- Receives visitors and telephone calls to the unit. Gives messages to patients, doctors and nurses, and responds to routine inquiries (i.e., where a patient has been transferred, location and phone number of doctors, time of patient appointment). Refers questions concerning the condition of a patient to the Charge Nurse.
- Notifies patients' private physician of the admission, or a resident physician assigned to the unit when patients do not have their own physician. Notifies departments such as dietetics, business office and admitting office upon discharge or transfer of patient.
- Assembles patients' charts according to an established sequence and in chronological order (i.e., Doctors' Orders, Nurses' Notes, TPR Graphs, Laboratory Sheets, Progress Reports and Face Sheet). Disassembles and rearranges patients' charts in prescribed order at time of discharge. Files properly in patients' charts results from laboratory tests, X-rays, consultations and medical reports as they are received from medical departments. Checks patients' charts before surgery to assure they include such material as the most recent laboratory and test results, an operative permit signed by the patient, and blank medical forms for the professional staff's use.
- Reviews nurse's admission notes for patient allergies. Places allergy label on patients' charts to preclude complications in treatment.

- Graphs/charts patient's temperature, pulse, respiration, blood pressure, intakes and outputs as recorded by the nursing staff.
- PAGE 16 4/78 TS-30
- Records physicians' orders for diagnostic procedures (e.g., X-rays), treatments (e.g., oxygen administration, ice packs), diets and patient activities from Doctors' Orders Sheet onto patient Kardex; prepares request forms for such things as X-rays, consultations and special diets as directed by Charge Nurse; checks off orders after action has been completed.
  - Files new or revised material according to subject matter into a reference library containing manuals, formularies, handbooks, guides, station circulars and minutes of staff meeting.
  - Keeps daily time and attendance for the unit.
  - Prepares from census sheets a periodic report of patient turnover in the unit
  - Types from Charge Nurse's rough draft such materials as weekly nursing time schedules, correspondence, memoranda, and records.

*Factor 1. Knowledge Required by the Position -- Level 1-2 -- 200 points*

- Knowledge of the unit procedures for assembling patients' charts in their required order and for transferring to various records doctors' orders for patient activities, diets, tests and treatments. (200 points)
  - Knowledge of the spelling and meaning of commonly used medical terminology (e.g., terms of anatomy and physiology, medical symbols and abbreviations, names of medical tests) to accurately graph and enter information into patient records. (200 points)
  - Knowledge to file test results, records and reference material according to the subject matter. (200 points)
  - Skill as a qualified typist to type memoranda and correspondence containing some specialized terminology when the timeliness of the typing is important. (200 points)
  - Knowledge of procedures for receiving, discharging and transferring patients in the unit. (50 points)

*Factor 2. Supervisory Controls -- Level 2-2 -- 125 points*

General supervision is received from the Charge Nurse, higher graded clerk, or Chief of Ward Administration, who provides specific oral or written instructions on changes in unit procedures. The employee works independently in completing recurring assignments. Refers questions to the supervisor when a source of information (i.e., written instructions or another medical clerk) is not available or cannot be located for a first time problem. Duties involving the recording of doctors' orders are closely reviewed for accuracy. Completed work is primarily spot-checked for compliance with unit procedures.

*Factor 3. Guidelines -- Level 3-1 -- 25 points*

Specific guides include established formats for assembling patients' medical charts and filing test results, formalized unit procedures for receiving and discharging patients, and written or oral directives concerning telephone calls and the release of patient information. Work is structured and performed with strict adherence to these guides. Deviations from guidelines are authorized by supervisor.

*Factor 4. Complexity -- Level 4-2 -- 75 points*

The clerk assembles, files and records a variety of medical and general information involving patients' medical file; considers such things as: the order in which information is assembled and filed, determines how and where to record physicians' orders, selects appropriate forms for completion and identifies obvious discrepancies in information about each patient.

*Factor 5. Scope and Effect -- Level 5-1 -- 25 points*

Timely and accurate completion of receptionist, recordkeeping and miscellaneous duties facilitates a smooth workflow in the unit and allows nursing staff more time for attending to patients.

*Factor 6. Personal Contacts -- Level 6-2 -- 25 points*

Personal contacts are with patients, visitors, personnel of other medical services and employees in the unit providing the patient care.

*Factor 7. Purpose of Contacts -- Level 7-1 -- 20 points*

Contacts are with patients for relaying messages and obtaining information necessary to complete medical forms. Contacts with other medical services are primarily to exchange or obtain patient information. Visitor contacts are to provide information of a general nature. Contacts with the staff are generally to obtain and/or clarify patient medical information.

*Factor 8. Physical Demands -- Level 8-1 -- 5 points*



Most work is performed while in a sitting position. There is some walking within the unit and to other parts of the medical facility. The employee stands and bends while filing materials.

*Factor 9. Work Environment -- Level 9-2 -- 20 points*

Work is performed in a medical facility environment where there is frequent contact with patients. Employee is exposed to communicable diseases.

**TOTAL POINTS -- 520**

PAGE 19 4/78 TS-30

**MEDICAL CLERK (TYPING), GS-0679-03, BMK #2**

*Duties*

Performs receptionist, recordkeeping and miscellaneous duties essential to the day-to-day operations in an inpatient unit of a psychiatric medical facility.

- Receives telephone calls and visitors to the unit. Provides routine information (e.g., concerning rules and regulations governing visiting hours and articles patients may have in the unit). On all questions concerning patient's condition secures pertinent data from records, assembles information and refers to supervisory nurse or physician for final decision in releasing information requested. Prepares a release of information form for each patient in the unit. Does not release information without obtaining the written consent of the patient or guardian.
- Stamps with Addressograph and assembles patient's chart forms in required sequence and chronological order. Inserts additional forms and makes charts available for clinic appointments, convalescent leave, etc. Files initialed laboratory reports, completed medication sheets and a variety of medical test and X-ray results in the correct patient chart and in the proper order. Consolidates and rearranges patients' medical records in required order upon transfer or discharge of patients. Inserts additional forms and makes charts available for clinic appointments, conferences and convalescent leave.
- Charts, as directed, temperatures, pressures, respirations, urine reductions, intakes and outputs on patients' medical records.
- Records physicians' orders for such things as treatments, diets, and restrictions of patient funds and activities.
- Initiates and routes proper forms for such things as the release of patient funds, clothing services, canteen coupon books and authorized absences upon physicians' determination that patient is competent.

PAGE 20 4/78 TS-30

- Maintains a unit calendar of scheduled events such as beauty or barber shop, occupational therapy, clinics and meetings. Records on a recurring basis the movement of patients to and from the unit. Keeps supervisor posted on patient's names, case number, date and time of activity.
- Prepares purchase orders for such things as medical supplies, comfort items for patients, and equipment for nursing service as necessary.
- Deposits to the personal account of the patients all funds including checks, cash or money orders received in the unit.
- Types such things as weekly time schedules, tours of duty, unit meeting notes and staff notes from nursing supervisor's rough draft. Types standard medical forms for such things as X-rays, laboratory work, and the dental survey.

*Factor 1. Knowledge Required by the Position -- Level 1-2 -- 200 points*

- Knowledge of the unit procedures for assembling patients' charts in their required order and for transferring to various records physicians' orders for treatments, diets and restrictions of patient funds and activities. (200 points)
  - Knowledge of the spelling and meaning of commonly used medical terminology of the unit (e.g., terms of anatomy, physiology, psychiatry, names of tests and medical abbreviations) in order to accurately graph and enter information onto patient records. (200 points)
  - Knowledge to file according to their subject matter such materials as medical records, laboratory reports, X-ray and test results. (200 points)
  - Knowledge of the procedures for receiving, transferring and discharging patients and a knowledge of the rules, regulations and forms applicable to the unit for use in receiving patients, visitors and telephone calls and releasing and recording information in patient records. (50 points)
- PAGE 21 4/78 TS-30
- Skill as a qualified typist to type such things as time schedules, nursing notes and medical forms containing some specialized terminology. (200 points)

*Factor 2. Supervisory Controls -- Level 2-2 -- 125 points*

General supervision is received from the Charge Nurse or Chief of Ward Administration who provides instructions concerning new procedures or changes in unit procedures. The employee carries out recurring functions related to medical records independently according to the established medical facility requirements for record documentation and the release of information.

Situations having legal significance or demanding knowledge of patient's condition are referred to the supervisor. Work is spot-checked for compliance with unit procedures and the facility requirements for medical records. Assignments which involve the recording of physicians' orders receive a close check for accuracy.

*Factor 3. Guidelines -- Level 3-1 -- 25 points*

Guides include unit manuals giving the established formats for assembling patients' medical records and for completing commonly used forms in the unit, medical dictionaries, written and oral directives concerning the release of patient information and precautionary measures maintained in the unit, and administrative regulations governing patients' finances and other personal matters. The work demands strict adherence to these guidelines.

*Factor 4. Complexity -- Level 4-2 -- 75 points*

Duties of assembling patients' charts, the filing and recording of medical information, and the completion and routing of a variety of medical request forms, require several sequential steps for completion. The clerk identifies the correct order, completeness, and obvious discrepancies in the information for all patients' records. The processes for completing work are repetitive, however, the information varies in relation to the circumstances and needs of each patient.

*Factor 5. Scope and Effect -- Level 5-1 -- 25 points*

The purpose of the work is to perform the recurring clerical functions of the unit in a timely and accurate manner to facilitate the work of staff members involved with patient care.

PAGE 22 4/78 TS-30

*Factor 6. Personal Contacts -- Level 6-2 -- 25 points*

Contacts are with patients, visitors, staff members of the unit, personnel of other facility services and members of community services, (e.g., clergy, nursing homes, social workers, lawyers and other representatives of the courts).

*Factor 7. Purpose of Contacts -- Level 7-1 -- 20 points*

Contacts with patients include giving instructions on where and to whom to report, receiving requests and assisting them on administrative matters. Other contacts are primarily for the purpose of providing or obtaining medical and general patient information.

*Factor 8. Physical Demands -- Level 8-1 -- 5 points*

Work is mostly sedentary with some walking and carrying of light items such as records and supplies to various locations within the medical facility.

*Factor 9. Work Environment -- Level 9-2 -- 20 points*

The employee works in close proximity to emotionally disturbed patients. There always exists the potential for physical abuse.

**TOTAL POINTS -- 520**

PAGE 23 4/78 TS-30

**MEDICAL CLERK, GS-0679-03, BMK #3**

*Duties*

Carries out a variety of receptionist, recordkeeping and miscellaneous clerical duties associated with patient treatment in a medical clinic.

- Upon receipt of telephone, personal or written request for medical treatment, determines the nature of the patient's request by questioning the patient about such things as the type and duration of symptoms and prior treatment received. Based on that information, refers the patient to the appropriate sub-speciality clinic, nurse practitioner or other member of the medical team. Follows established clinic policy and procedures in referring patients for immediate treatment when requests are accompanied by complaints of acute symptoms.
- Receives routine telephone calls and visitors. Provides information as to the procedure to follow for registration of new patients, location of clinic, operating hours etc. Relays incoming and outgoing telephone calls to professional staff.
- Schedules appointments and makes necessary arrangements for patients such as requesting medical records, assembling and filing such things as X-rays and laboratory reports. Arranges patient appointments for visits, referrals and other appointments occasionally requiring coordination of scheduled time with outside medical facilities.
- Composes correspondence such as answers to routine questions concerning regularly scheduled days for the various speciality clinics.
- Performs miscellaneous duties in support of the clinic staff such as keeping schedules of time and leave, lectures and other scheduled activities. Keeps daily statistic concerning cancellations, informational calls, and verification of appointments.

PAGE 24 4/78 TS-30

*Factor 1. Knowledge Required by the Position -- Level 1-2 -- 200 points*

- Knowledge of clinic procedures for scheduling appointments and referring patients to the appropriate clinical unit, physician or other service of the medical facility. (200 points)
- Knowledge of the types of medical problems treated by each sub-speciality clinic (e.g. orthopedics, neurology) in order to make expeditious referral of patients. (200 points)
- Knowledge of the meaning of commonly used medical terminology (e.g. terms of anatomy) used in determining nature of patient requests for treatment and to file results of X-rays and laboratory reports according to subject matter. (200 points)

*Factor 2. Supervisory Controls -- Level 2-2 -- 125 points*

General supervision is received from the Technician-in-Charge and/or Charge Nurse who provides specific oral or written instructions on changes in clinic procedures. The employee works independently in completing recurring assignments. Refers questions to the supervisor when a source of information is not available or cannot be located for a first time problem. Completed work is spot-checked primarily for compliance with clinic procedures.

*Factor 3. Guidelines -- Level 3-1 -- 25 points*

Guidelines are available for most assignments and generally include medical dictionaries, written and oral directives regarding the reception of patients and the scheduling of appointments. Directives are followed closely in referring the patient to the appropriate sub-speciality unit.

*Factor 4. Complexity -- Level 4-2 -- 75 points*

The reception and referral of patients differs according to the medical problem of the patient. The employee must obtain enough information from the patient to determine to which sub-speciality unit to make referral. Tasks associated with the recording of medical information are procedural, but vary in the kinds of information gathered about each patient.

PAGE 25 4/78 TS-30

*Factor 5. Scope and Effect -- Level 5-1 -- 25 points*

The completion of receptionist and recordkeeping duties in a timely and accurate manner facilitates a smooth workflow in the clinic and allows the nursing staff more time for attending to patients.

*Factor 6. Personal Contacts -- Level 6-2 -- 25 points*

Personal contacts are with patients affected by a variety of problems, visitors, personnel of other medical services, and employees in the unit providing patient treatment.

*Factor 7. Purpose of Contacts -- Level 7-2 -- 50 points*

Contacts are with patients for the purpose of obtaining information concerning their medical complaints and making referrals to the appropriate sub-speciality unit. The employee must accurately relay patients' account of medical complaints to the medical staff who will be involved in treating the patient. Contacts with other medical services are primarily to exchange or obtain medical or general information and make adjustments in scheduling patient appointments.

*Factor 8. Physical Demands -- Level 8-1 -- 5 points*

Most work is performed in a sitting position. There is some walking, standing and bending.

*Factor 9. Work Environment -- Level 9-1 -- 5 points*

The work is performed in a detached clinic setting. The employee has contact with outpatients, typically ambulatory patients. The employee is not usually exposed to unusual risks or discomforts.

**TOTAL POINTS -- 535**

PAGE 26 4/78 TS-30

**MEDICAL CLERK, GS-0679-03, BMK # 4**

*Duties*

Performs receptionist, recordkeeping, and miscellaneous duties in an obstetrics and gynecology clinic.

- Receives patients, telephone calls, and written correspondence asking for appointment to the clinic. Schedules patient appointments for such things as prenatal examinations, routine laboratory tests, X-rays, and follow-ups of prenatal condition due to complications. Receives requests involving emergency situations and promptly relays details from patient to one of the clinic physicians. Schedules additional appointments based on instruction from physician as to the time which should elapse between examinations.
- Receives requests by mail; determines proper physician for referral based on knowledge of physicians' caseload, and then completes appointment card listing time and date for reporting to the clinic.

- Obtains patients' medical records and laboratory reports from appropriate hospital unit prior to patient appointment and assembles it in required order. Inserts additional medical forms for physician's use as needed. Files such things as results of laboratory tests and X-rays in patients' record according to subject matter headings. Receives daily report of pregnancy test, records the results in patient medical record and conveys the information to the respective patient.
- Keeps log of patient seen daily according to military status (i.e. active duty, dependent, retired), and type of appointment (i.e. prenatal, follow up). Records the number of patients failing to keep appointments. Compiles data on a daily and monthly basis on the number of patients treated at the clinic.

*Factor 1. Knowledge Required by the Position -- Level 1-2 -- 200 points*

- Knowledge of the clinic procedures and regulations for making appointments, assembling patient medical records, recording test results, relaying information regarding patient's condition, and compiling and submitting data on patients treated. (200 points)

PAGE 27 4/78 TS-30

- Knowledge of the spelling and meaning of commonly used terminology of the obstetrics and gynecology clinic to accurately record results of tests and file medical reports according to subject matter. (200 points)

*Factor 2. Supervisory Controls -- Level 2-2 -- 125 points*

Clerk receives oral or written instructions from Administrative Assistant, Outpatient Service, regarding changes in clinic procedures. Receives instructions from clinic doctors concerning their commitments and the number of patients to schedule each day. The clerk works independently while performing receptionist and recordkeeping duties. Work is mostly spot-checked. The scheduling of appointments is reviewed in terms of results attained (i.e., absence of conflicting appointments, and the patient records available at time of treatment).

*Factor 3. Guidelines -- Level 3-1 -- 25 points*

Guides include specific medical center policy regarding the release of patient information and the handling of telephone calls; the format for keeping of appointment schedules, and logs of patients seen daily. These guides are supplemented by oral explanations or instructions from clinic physicians regarding the emergency calls.

*Factor 4. Complexity -- Level 4-2 -- 75 points*

Duties of making appointments; obtaining, assembling and filing medical records; recording and reporting results of pregnancy tests; and making reports of patients treated; require several sequential steps for completion. When making appointments, the clerk obtains necessary information from the patient, decides upon an appropriate hour and date, trying to accommodate the patient's wishes or circumstance and availability of the physician, enters name and pertinent information in the appointment book and fills out an appointment card for the patient. The procedures for completing most of the work are repetitive; however, the clerk may vary the sequence of steps if circumstances warrant.

PAGE 28 4/78 TS-30

*Factor 5. Scope and Effect -- Level 5-1 -- 25 points*

The accurate and timely completion of the receptionist, recordkeeping and miscellaneous tasks facilitates a smooth workflow in the clinic and provides the necessary clerical support to the staff personnel involved with patient care.

*Factor 6. Personal Contacts -- Level 6-2 -- 25 points*

Contacts are with patients, staff members of the clinics and personnel of other medical services (e.g. laboratory and inpatient units).

*Factor 7. Purpose of Contacts -- Level 7-1 -- 20 points*

Contacts are with patients for obtaining information necessary to schedule appointments and for relaying information regarding pregnancy tests. Contacts with other medical service personnel are to obtain medical records or to give information on numbers of patients treated. Contacts with the professional staff members are generally to obtain information on the number of patients to schedule for a given day.

*Factor 8. Physical Demands -- Level 8-1 -- 5 points*

Work is mostly sedentary.

*Factor 9. Work Environment -- Level 9-1 -- 5 points*

Work is performed in a clinic setting in which there is no unusual risk or discomforts to the employee.

**TOTAL POINTS -- 505**

PAGE 29 4/78 TS-30

**MEDICAL CLERK (TYPING), GS-0679-04, BMK #1**

[Main Menu](#)   [Exit](#)



*Duties*

Has responsibility for initiating and carrying out a variety of clerical duties associated with patient care and treatment on one or several inpatient units of a general medical or surgical facility.

- Upon reception and discharge of patients, assembles records in correct sequential and chronological order, assures required forms are complete and signed by professional staff, notifies various departments of the action, makes necessary arrangements for transfer of patient to other hospitals or nursing homes, verifies and assures that records of patient treatment including hospitalization summary and operative reports are complete, accurate and properly filed before forwarding to Medical Records.
  - Records a variety of physicians' orders involving patient activities, diets, tests and medications, on a timely basis to various charts, (e.g., Kardex, Nursing Care Plan, medication and treatment records). Identifies various chemical compounds, symbols and abbreviations comprising medication orders and accurately transfers drug names, dosages, and times of administration to cards used for dispensing the medication. Transfers orders for patient activities, diets and tests to a wide variety of request forms and routes them to appropriate department for action.
  - Records telephone messages pertaining to such things as detailed laboratory reports, X-rays and test results, recognizes and refers urgent ones to the professional staff for immediate action. Files the results of various tests in patients' charts for professional staff's reference, keeping record of care current and accurate.
  - Arranges appointments for patients with clinics, services and consultants, coordinates appointments for timeliness and to avoid conflicts in patient treatment and to meet the schedule of clinic or service to which referred. Initiates forms for authorizations to perform surgery and other procedures, checks records to determine whether or not patient is competent, of legal age, and authorized to sign. If patient is incompetent or otherwise not permitted to sign, initiates action to obtain permission from next of kin. Requests transportation for patients receiving treatment within or outside the immediate facility.
- PAGE 30 4/78 TS-30
- Searches patients' medical and administrative records for specific information, (e.g., diseases, diagnosis, type of hospital insurance coverage), to determine patients' eligibility for such things as outpatient care and prosthetics, and reports such data to physician planning treatment.
  - Orients new doctors, nurses and nursing assistants to such things as the location of patient files, format for requesting medical tests and supplies, and the requirements for completing charts upon discharge.

- Assists patients in contacting volunteer or social services as needed, furnishes information for insurance claims, and prepares statements of hospitalization for signature of unit physician.
- Prepares a weekly nursing work schedule based on instructions from Charge Nurse and serves as daily timekeeper for the unit nursing staff.
- Types such things as medical summaries, progress reports and consultations from medical staff's rough draft.

*Factor 1. Knowledge Required by the Position -- Level 1-3 -- 350 points*

- Knowledge of the internal organization of patient records and the relationship of their parts, in order to search records and extract medical information and data relevant to the planning of patient treatment, and to review records for completeness, accuracy and consistency with facility requirements upon the discharge of patient. (350 points)
- Knowledge of the various facility services, the medical terminology and procedures common to each service in order to record and report test and X-ray results accurately, give necessary instructions to patients for diagnostic procedures and to properly arrange patient appointments in order to avoid conflicts in patient care. (350 points)
- Thorough knowledge of unit procedures for assembling patient charts, recording physicians' orders, integrating X-ray and test reports, graphing and charting medical data, and scheduling patient appointments to independently perform the clerical work of the unit relevant to patient care and treatment. (350 points)
- Skill to type hospital summaries, progress reports, and consultations containing specialized medical terminology under timely circumstances. (200 points)

PAGE 31 4/78 TS-30

*Factor 2. Supervisory Controls -- Level 2-2 -- 125 points*

General supervision is received from the Charge Nurse or Chief of Ward Administration who instructs the employee on changes in unit procedures. The employee initiates and carries out assignments independently, referring unusual problems to the supervisor. The recording of medication orders are carefully reviewed for accuracy by the Charge Nurse. Work is periodically checked for compliance with established medical facility requirements.

*Factor 3. Guidelines -- Level 3-1 -- 25 points*

Guides include facility manuals that give step-by-step descriptions of unit procedures as well as working examples of commonly used forms in the unit, facility policy manuals applicable to the administrative functions of the unit, and references describing medications, diets, kinds of tests and instructions for their preparation. Guides are supplemented by oral directives from Charge Nurse for such things as preparing work schedules and arranging patient appointments. These guidelines for the most part cover every situation. The clerk uses little judgment in selecting guidelines for application to individual situations. Guidelines are closely adhered to in the performance of duties and deviations from or changes in their use are authorized by the supervisor.

*Factor 4. Complexity -- Level 4-2 -- 75 points*

Work consists of reviewing, selecting and interpreting medical information for use in assuring accuracy and completeness of patient records, providing specific medical data for physician requests and reports, and coordinating patient care activities. The employee identifies obvious omissions and discrepancies in medical data and recognizes the urgency for reporting the specific medical information to staff members and for coordinating patient appointments. The procedures for accomplishing work are established and do not vary. Differences exist in medical information and materials such as standard forms used to complete the processes.

PAGE 32 4/78 TS-30

*Factor 5. Scope and Effect -- Level 5-2 -- 75 points*

Performance of clerical duties with respect to patient care affects the efficiency with which the facility unit provides service.

*Factor 6. Personal Contacts -- Level 6-2 -- 25 points*

Personal contacts are primarily with patients, members of patient care teams and employees of various facility services.

*Factor 7. Purpose of Contacts -- Level 7-2 -- 50 points*

Patients are given instructions to prepare them for scheduled tests. Employee works cooperatively with members of patient care teams to insure information pertaining to patient care and treatment is correct, accurate and properly recorded in medical records to meet hospital requirements. Facility services are contacted to coordinate patient appointments and obtain results of tests and X-rays.

*Factor 8. Physical Demands -- Level 8-1 -- 5 points*

Work is mostly sedentary, but demands some standing, walking, and bending.

*Factor 9. Work Environment -- Level 9-2 -- 20 points*

Work is performed in or near the nurses' station on a medical facility unit. Employee works in close proximity to patients and is therefore exposed to communicable diseases.

**TOTAL POINTS -- 750**

PAGE 33 4/78 TS-30

**MEDICAL CLERK (TYPING), GS-0679-04, BMK #2****Duties**

Initiates and carries out clerical functions closely related to the care and treatment of patients in an inpatient unit of a psychiatric medical facility.

- Consolidates patient records upon admission, transfer, authorized and unauthorized absences, discharges, and death; assembles medical information according to the prescribed sequential order; checks contents such as treatment records, progress notes and doctors' order sheets for required signatures and complete data before initiating final clearance of records.
  - Records physicians' orders for patient activities, restrictions, diagnostic tests and medications; under timely circumstances, transfers orders to a variety of records including request forms, patient Kardex, and continuing medication and treatment records. Identifies symbols and abbreviations comprising medication orders and accurately records the drug names, dosages and times of administration on nursing cards used for dispensing the medication. Prepares prescription orders for medications given to patients authorized for leave or discharge. Initiates and prepares similar forms for patients receiving continuing medications.
  - Schedules patient appointments with various clinics and services throughout the facility, coordinating all activities and appointments of the unit to avoid conflicts in each patient's treatment plan. Initiates action to notify nursing personnel and patients of appointments, determines the need for escort and whether or not chart should accompany patient after reviewing medical records.
  - Reviews such documents as consultation and clinic reports to inform staff physician and/or Charge Nurse of recommendations for treatment and follow up where indicated.
- PAGE 34 4/78 TS-30
- Arranges schedule of weekly psychiatric staffings with the consulting physician for the unit; prior to meetings, reviews patients' records noting on a summary statement such things as chief complaints, duration of symptoms, clinical impressions, and results of medical reports and tests; insures summaries are available for review at the meetings.

- Frequently receives unclear inquiries from patients concerning a variety of medical, personnel and administrative matters; determines nature of inquiry and independently responds to all administrative questions. For example, upon request from patients, completes appropriate forms and initiates action for the receipt, deposit or disbursement of patients' funds. Refers medical questions concerning patient's condition, progress or treatment to Charge Nurse or physician, responds to similar questions from family members, social workers or outside sources upon instructions and authorization of physician.
- Attends regular staff meetings regarding patient's progress. May orally relate observations made of any new or unusual patient behavior, but is not held professionally responsible for such observations.
- As directed, prepares schedules of work assignments and tours of duty for nursing personnel in the unit. Keeps daily time and attendance for unit staff.
- Takes inventory and requisitions adequate stocks of unit supplies, including linen, central supply, drugs, and medicines. Works in close liaison with medical services to expedite emergency requests as required for day-to-day patient care. Signs documents authorizing the purchase and receipt of various supplies and equipment for patients and unit use, excluding medicines and drugs.
- Types from voice recordings into final form such materials as progress notes, consultations, transfer notes, discharge summaries and other clinical material containing specialized medical terminology.

PAGE 35 4/78 TS-30

*Factor 1. Knowledge Required by the Position -- Level 1-3 -- 350 points*

- Knowledge of the internal organization of patient records and the relationship of their parts in order to search records and extract medical information and data pertinent to the treatment of patients and to review records for completeness, accuracy and consistency with medical facility requirements upon discharge and/or transfer of patient. (350 points)
- Thorough knowledge of the unit procedures requiring familiarity with the patient's condition and affecting the care and treatment of patients such as those involving the recording of physicians' orders, reviewing, extracting and recording medical information and data for the professional staff's use in planning care, and scheduling such things as psychiatric meetings, therapies and consultations. (350 points)

- Knowledge of the various medical facility services, the medical terminology and procedures common to each service in order to receive and report results of tests and X-rays, to assist patients in obtaining a variety of health and personal business needs and to arrange appointments and properly instruct patients to avoid conflicts in treatment. (350 points)
- Skill to type from voice recordings into final form such materials as progress notes, consultations, discharge summaries and other materials containing specialized medical terminology. (350 points)

*Factor 2. Supervisory Controls -- Level 2-2 -- 125 points*

General supervision is received from the Chief of Medical Administration Services who provides instructions on new or changed unit procedures. New directives, procedures and problems concerning unit practices are discussed at regular meetings. The employee works independently in completing assignments according to previously established objectives and guidelines. Problems not covered by guides or instructions, which mostly arise out of emergency situations, are referred to the supervisor. Recording of physicians' orders involving medicines and drugs are closely reviewed for accuracy by the Charge Nurse.

PAGE 36 4/78 TS-30

Other completed work is spot-checked primarily for compliance with unit procedures.

*Factor 3. Guidelines -- Level 3-1 -- 25 points*

Manuals are available describing unit procedures for assembling patient charts and recordings physicians' orders, and for admitting and discharging patients. Administrative guides govern the control of patient funds, the release of information and safety precautions necessary on the unit. These guides are supplemented by oral directives from the attending physician concerning the best approach to use in dealing with individual patients, in handling their requests and in eliciting information which is pertinent to physician's plan of treatment.

Assignments are performed according to established procedures and medical facility policy, the clerk is allowed little opportunity to make choices.

*Factor 4. Complexity -- Level 4-2 -- 75 points*

Work consists of reviewing, selecting and interpreting medical information for use in such things as assuring accuracy and completeness of patient records, providing specific medical data for physician requests and reports, and coordinating patient care activities. The employee identifies obvious discrepancies and omissions in medical data and recognizes the urgency for reporting information to staff members. In coordinating patient appointments and carrying out activities related to treatment of patient the employee recognizes the need for accurate and timely action but objectives and procedures for accomplishing the assignments are established.

*Factor 5. Scope and Effect -- Level 5-2 -- 75 points*

Duties such as those involving the timely and accurate recording of physicians' orders, scheduling of patient appointments, compiling medical data relative to patient's status, and assisting patients with a variety of concerns affects the overall quantity and quality of services provided by the unit.

PAGE 37 4/78 TS-30

*Factor 6. Personal Contacts -- Level 6-2 -- 25 points*

Personal contacts are with patients and their families, members of patient care teams, employees of other medical services and representatives of various community agencies.

*Factor 7. Purpose of Contacts -- Level 7-2 -- 50 points*

The purpose of contacts with patients is to give them instructions regarding scheduled activities and assist them in personal or administrative matters when they frequently are confused or do not understand. Other contacts are generally for the purpose of scheduling patient activities and furnishing compiled medical data, and coordinating these efforts with other members of the unit and facility services having a mutual concern for strengthening the welfare of patients.

*Factor 8. Physical Demands -- Level 8-1 -- 5 points*

The work is primarily sedentary with occasional periods of standing, walking, and bending.

*Factor 9. Work Environment -- Level 9-2 -- 20 points*

Some potential dangers and discomforts are present when constantly working with psychiatric patients. Special safety precautions are required in the unit

**TOTAL POINTS -- 750**

PAGE 38 4/78 TS-30

## **MEDICAL CLERK (TYPING), GS-0679-04, BMK #3**

*Duties*

Initiates and carries out a variety of clerical duties associated with the treatment of patients in a large occupational health clinic.

- Receives patients and telephone calls to the clinic, obtains identifying information and determines the nature and urgency of the patients' request. Refers patients requiring immediate medical attention to physicians. Completes proper medical forms for patients with occupational disease or injury and directs patients to appropriate medical unit (e.g., laboratory, X-ray). Places telephone calls to patients notifying them when their safety glasses are ready for pickup.

- Schedules appointments and keeps appointment logs for patients requiring a variety of physical examinations (i.e., preemployment, fitness for duty, occupational hazards screening, disability retirement), repeat visits, laboratory tests, and eye and hearing examinations. Instructs patients on preparation for those examinations involving exploratory procedures and directs them to appropriate clinic or laboratory area. Records information concerning patients' conditions, treatment received, and summary results, into a variety of clinic case logs.
  - Assembles outpatient medical records for patients' initial visit. Following treatment, reviews records to ensure all information is complete, accurate and in proper sequence in accordance with current directives. Reviews medical record to obtain diagnosis and treatment for initiation of hospital referral forms when disease or injury is work related; in order to fill out various case logs used for statistical reports; and to complete prescription orders for industrial safety glasses.
  - Informs new physicians, visiting physicians, and interns, regarding policy and regulations related to outpatient programs such as the type of clinics, tests and treatments available, eligibility of patient for clinic services, medical personnel in each clinic, procedures for arranging tests at other treatment centers, and availability of transportation.
- PAGE 39 4/78 TS-30
- Types from handwritten drafts, a variety of medical reports, correspondence and forms pertaining to patient treatment. Types request forms for general office supplies and purchase orders for optical lens, frames and parts.

*Factor 1. Knowledge Required by the Position -- Level 3-1 -- 350 points*

- Knowledge of the clinic procedures for reviewing various medical records and abstracting medical data on work related diseases or inquiries; scheduling patient appointments and initiating medical forms; recording medical information in a variety of case logs; and procuring lenses, frames and optical parts; in order to independently perform the clerical work of the clinic relevant to patient treatment. (350 points)
- Knowledge of the internal organization of patient records in order to assemble new outpatient medical records, review records for completeness, consistency and accuracy of information in accordance with current clinic policy, and to select medical information (e.g., patient diagnosis, results of tests and lens prescriptions) for initiating and completing medical forms and logs. (350 points)
- Knowledge of the various services offered by the clinic, the medical terminology and procedures required for each type of physical examination, in order to schedule patient appointments, respond to patient inquiries, and to inform physicians about available clinic services. (200 points)



-- Skill to type from rough draft into final form such things as medical reports, correspondence and forms pertaining to the treatment of patients. (200 points)

*Factor 2. Supervisory Controls -- Level 2-2 -- 125 points*

General supervision is received from the Supervisory Occupational Health Nurse who assigns the employee to various treatment units within the clinic and explains any changes in unit procedures. The employee initiates and carries out recurring assignments independently, referring patients requiring immediate attention to physicians. Work that is directly related to patient care, such as results of tests, is carefully reviewed by the nurse in charge of the unit. Other work, such as recordkeeping, is periodically checked for compliance with established requirements.

PAGE 40 4/78 TS-30

*Factor 3. Guidelines -- Level 3-1 -- 25 points*

Guides include clinic operation manuals describing clinic procedures as well as working examples of the more commonly used types of physical examinations and the forms required. Written guidelines are supplemented by oral instructions from the supervisor when work schedules are changed to meet peak patient loads in particular treatment units. Guidelines must be closely followed in the performance of duties, and deviations in applying the procedures are authorized by the supervisor.

*Factor 4. Complexity -- Level 4-2 -- 75 points*

Work involves several procedures such as assembling patients' charts, scheduling patient appointments, and reviewing and selecting medical information for a variety of purposes. The procedures for completing the work are repetitive, however, the particular forms, medical information, and appointments vary according to the nature of the patients' medical problem.

*Factor 5. Scope and Effect -- Level 5-1 -- 75 points*

The performance of clerical duties involving screening of patients' calls, scheduling of patients' appointments, instructing patients on preparation for tests and informing new physicians of services available in the clinics, affects the efficiency of the clinic and the adequacy of patient treatment provided by it.

*Factor 6. Personal Contacts -- Level 6-2 -- 25 points*

The clerk has personal contact with the professional staff of the clinic, patients, and other visitors to the clinic.

*Factor 7. Purpose of Contacts -- Level 7-1 -- 20 points*

Contacts with members of the staff are generally for giving or obtaining a variety of general and medical information. Contacts with patients are primarily for obtaining information from patient as to the purpose of their visit and giving instructions on where, when, and to whom to report.

PAGE 41 4/78 TS-30

*Factor 8. Physical Demands -- Level 8-1 -- 5 points*

Work is mostly sedentary. There is some walking, stooping, bending and lifting of light medical supply items.

*Factor 9. Work Environment -- Level 9-1 -- 5 points*

Position is located in an occupational health clinic. The clerk is generally not subject to communicable diseases or physical discomfort.

**TOTAL POINTS -- 705**

PAGE 42 4/78 TS-30

## **MEDICAL CLERK, GS-0679-04, BMK #4**

### *Duties*

Performs receptionist, recordkeeping and all clerical duties related to patient treatment in a clinic responsible for a variety of outpatient treatment programs and for inpatient consultations.

- Receives all telephone calls and visitors to the clinic (i. e., inpatients, outpatients, military personnel, families and friends of patients), regarding such things as the availability of, and procedures for obtaining medical assistance, directions and information for contacting various departments, services and patients, and requests for changes in scheduled appointments. Questions caller to obtain sufficient information necessary to determine primary need or area of interest and provides assistance or makes referrals to other responsible hospital personnel when matter is outside employee's scope of assignment.
  
- Interviews patients who request initial treatment or unscheduled examinations, and obtains information regarding the type of medical problem, whether service-connected or service-connected, and prior treatment received. Reviews such things as discharge papers to obtain identifying information and determines eligibility for treatment. Initiates

appointments for patients eligible for treatment. Refers patients not eligible for treatment to supervisor or other hospital service.

- Initiates patient appointments for tests such as X-rays, electrocardiograms, and laboratory exams, with the servicing department, ward, clinics and centralized scheduling unit. Explains necessary test preparations to patients and records information such as date, type of exam, and procedures required, on appointment cards. Schedules and coordinates return appointments with the central scheduling unit for patients not physically able to go through the normal appointment making process.
- PAGE 43 4/78 TS-30
- Obtains all medical charts prior to patients arrival to the clinic. If record is not available through normal clinic procedures, locates record from information given by the medical record department, or by calling the various nursing units, clinics or physicians' offices. Files results of examination in patient charts (i.e., laboratory sheets, X-rays, electroencephalograms). Records in patient charts, telephone reports of laboratory findings, and relays report to physician or nurse in a timely and accurate manner.
  - Reviews charts of patients being discharged from clinic for completeness of information and makes new appointments, or notes changes in patient status as necessary. Based on review of the patient information, refers charts for physician's determination as to whether patient is retained in various medical programs
  - Reviews charts to determine patient's eligibility for requested medication. If eligible for medication at government expense, fills out prescription and mailing labels and forwards to physician for signature. Lists prescription on mail out records and forwards to pharmacy for mailing of medications to patients.
  - Initiates and completes necessary forms for travel reimbursement of patients authorized travel at government from available resources, such as authorization dates, allowed cost, point of origin, and certifies and dates beneficiary reports. Signs travel vouchers after information is complete and refers them to the cashier for payment. Authorizes special meal requests for patients determined eligible for meals while attending clinic.

*Factor 1. Knowledge Required by the Position -- Level 1-3 -- 350 points*

- Thorough knowledge of clinic procedures for receiving and following through on patient requests for treatment; obtaining and reviewing patients' medical records; scheduling patient appointments and giving preparatory instructions to patients for a variety of medical procedures; and recording, reporting and filing medical information; in order to relate the clerical functions of the clinic to the total patient treatment process. (350 points)

PAGE 44 4/78 TS-30

- Knowledge of the internal organization and content of patients' medical records in order to search records and extract a variety of medical information and data relevant to the planning

of patient treatment, for readily retrieving sufficient information necessary to determine patients eligibility for service (e.g., treatment, government paid medication, and travel expenses), and for reviewing records for completeness, accuracy and consistency with medical facility requirements upon discharge from clinic. (350 points)

- Knowledge of agency regulations governing patients' eligibility for paid medications, travel and meal expenses, while attending clinic. (200 points)
- Knowledge of the meaning and spelling of medical terminology to fill out medical reports, file results of laboratory exams and to relay medical information to members of the immediate staff and other services of the facility. (200 points)

*Factor 2. Supervisory Controls -- Level 2-2 -- 125 points*

Work is performed under the supervision of the Chief, Outpatient Department, who makes changes in clinic procedures and is available for guidance in unusual problem or emergency situations. The clerk works in an area remote from the supervisor and is responsible for initiating and following through on recurring functions of the clinic. Advice on unusual situations is sometimes provided by the nurse or physicians in the clinic. Work is primarily reviewed in terms of the overall efficiency of service provided to patients and clinic employees.

*Factor 3. Guidelines -- Level 3-2 -- 125 points*

Guidelines are available concerning procedures for making appointments; release of patient information; filing and recording information in patients' charts; various medical tests procedures; and regulations governing eligibility for paid travel and medications. The medical clerk uses judgment while interviewing patients for treatment and gathering sufficient information to make appointments, alter schedules, and allow for emergency situations requiring immediate medical attention. Some degree of judgment is also used in applying regulations governing paid medications, travel and meal expenses to individual circumstances of patients.

PAGE 45 4/78 TS-30

*Factor 4. Complexity -- Level 4-2 -- 75 points*

The work involves several clerical procedures pertinent to outpatient and inpatient treatment (i.e., interviewing and scheduling patients for treatment, relaying and recording medical information, and assembling, filing and reviewing medical records of patients). The clerk carries out procedures with consideration of factors such as the physical condition of the patient, the legal eligibility for treatment, the military status of the patient, the appointment vacancies in the clinic, the availability of physicians, and the existence of a medical record and supporting medical information. Differences in the work result from such things as changing priorities as a result of emergency situations, adjustments in treatment schedules, and medical information about each patient.

*Factor 5. Scope and Effect -- Level 5-2 -- 75 points*

The purpose of the work is to initiate and follow through on all clerical procedures during the treatment process. The completion of duties affects the attitude of patients and efficiency with which the clinic provides service.

*Factor 6. Personal Contacts -- Level 6-2 -- 25 points*

Personal contacts are with inpatients and outpatients, families and friends of patients, visitors to the clinic (e.g., military personnel), physicians, and nurses of the clinic, and employees of other medical services.

*Factor 7. Purpose of Contacts -- Level 7-2 -- 50 points*

Contacts with patients are for scheduling appointments of treatment frequently requiring adjustments in schedules to meet the needs of the patients. The clerk explains necessary test preparations to the patient and follows through on the treatment process, assisting the patient in obtaining paid medications, travel expenses and meals while attending the clinic. The clerk coordinates appointment schedules with servicing departments. (e.g., laboratories, hospital wards, other clinics, and the centralized scheduling unit)

PAGE 46 4/78 TS-30

*Factor 8. Physical Demands -- Level 8-1 -- 5 points*

Work is mostly sedentary with some walking, standing, and bending while filing and carrying light medical supplies and records.

*Factor 9. Work Environment -- Level 9-2 -- 20 points*

Work is performed in a clinic responsible for treating patients with a wide variety of medical problems, including psychiatric patients and inpatients referred to the clinic on consultations. The clerk is frequently exposed to communicable diseases. Safety precautions are sometimes necessary.

**TOTAL POINTS -- 850**

PAGE 47 4/78 TS-30

**MEDICAL CLERK (TYPING), GS-0679-04, BMK #5***Duties*

Has responsibility for initiating and carrying out a variety of receptionist and clerical duties in a mental health clinic.

- Receives telephone calls and visitors to the clinic. Determines the source of the call or visit (e.g., foster home, people seeking admission, relatives, nurses, social workers). Answers questions regarding admission policy, cancellation of appointments, clinic hours and clinic services. Applies established guidelines concerning the release of information on patients' condition, patients' appointments, new admissions, transfers, and deaths. Relays messages, considering the nature of incoming patient information and the need for alerting the nurse promptly.
  - Receives recurring patients to the clinic; reports obvious changes in patient behavior to the professional staff. Schedules recurring patients for such things as physicals, lithium tests and special diagnostic tests. Instructs patients on standard procedures required prior to test, such as liquid intakes, medications and dietary instructions. Arranges patient appointments with other clinics as instructed by the physician, avoiding conflicts in the treatment of the patient.
  - Interviews new patients to the clinic to obtain identifying information such as name, case number, ward physician, source of income, living arrangements, medical complaints and psychiatric alert code. Schedules appointments for new patient based on clinic schedule and the availability of physician assigned to patient.
  - Assembles outpatient charts in sequential and chronological order. Reviews patient charts prior to appointment for complete and accurate medical information. Files new material, such as results of laboratory tests, X-rays and other examinations in patient charts. Reviews summary of weekly staff meetings and as requested by professional members of the staff (e.g., social workers, psychiatrists), searches patient charts and compiles related information such as behavior notes, laboratory results, and medications.
- PAGE 47 4/78 TS-30
- Procures and distributes cash to patients competent to handle funds. Reviews patients' cash account and determines availability of funds in individual accounts, restrictions on funds and clears competency of patient to handle funds through the appropriate physician. Initiates travel vouchers for patient undergoing special tests. Requests and distributes bus tokens and taxicab vouchers. Records incoming cash and checks for patients and issues receipts. Requisitions patients clothing, checks completed order for type and size of apparel, and issues clothing.
  - Records admissions, discharges and change of patient status in daily report. Notifies inpatient unit of patients' movements involving return from leave and discharge. Informs nurse of unscheduled change in patient's status.
  - Types a variety of material including progress reports, memoranda, hospital summaries, and psychiatric notes from dictating machine and rough drafts. Gathers and assembles enclosures in proper order, compares patients' charts to dictated material, verifies the accuracy of the material and assembles report.

*Factor 1. Knowledge Required by the Position -- Level 1-3 -- 350 points*

- Thorough knowledge of the clinic procedures for scheduling patient appointments, assembling patient charts, releasing patient information, and procuring patient funds in order to relate the clerical functions of the clinic to the total patient care process. (350 Points)
- Knowledge of the internal organization of medical records and the relationship of their parts in order to search records and extract relevant data for the official release of patient information and the planning of patient treatment. (350 points)
- Knowledge of the various medical facility units and services, the medical terminology and procedures common to each unit and service in order to record and report test and X-ray results accurately, to give preparatory instructions to patients for a variety of diagnostic procedures and properly arrange appointments to avoid conflicts in patient care and treatment. (350 points)
- Skill to type from voice recordings into final form, progress reports, clinic summaries, and psychiatric notes containing specialized terminology. (350 points)

PAGE 49 4/78 TS-30

*Factor 2. Supervisory Controls -- Level 2-2 -- 125 points*

General supervision is received from the Charge Nurse who provides instructions concerning new and/or changes in clinic procedures. The employee carries out recurring duties independently, referring unusual problems to the Charge Nurse. The Charge Nurse carefully reviews reports which release information on patient treatment. Other completed work is periodically checked for compliance with clinic procedures.

*Factor 3. Guidelines -- Level 3-2 -- 125 points*

Guidelines include manuals stating formalized unit policies and procedures for patient appointments; receiving and discharging patients; release of patient funds; relaying information to the medical staff; specific policy governing the release of patient information; and general formats for requesting bus tokens and patient clothing. While the guidelines are specific, the clerk must frequently use judgment in dealing with situations such as walk-in patients requesting treatment, requests by callers for the medical staff's immediate attention, and whether to follow established discharge procedure following missed appointments or refer case to supervisor for special consideration.

*Factor 4. Complexity -- Level 4-2 -- 75 points*

Assembling patients' charts, procuring patients' funds, filing and recording of medical information, extracting and releasing patient information, and arranging for patient transportation; involve a variety of procedural duties. The clerk identifies the party requesting patient information and follows sequential steps in filling the request. The employee identifies the urgency for reporting specific type of calls or relaying observation of obvious changes in patient behavior to the staff.

*Factor 5. Scope and Effect -- Level 5-2 -- 75 points*

Duties such as recording and reporting of patient medical information, the relaying of calls requiring immediate attention of the staff and scheduling of appointments affects the ability of the clinic to provide good patient care.

*Factor 6. Personal Contacts -- Level 6-2 -- 25 points*

Contacts are with patients, staff members of the clinic, friends and relatives of the patient, personnel of other facility services and members of community services (e.g., social workers, lawyers, nursing and foster home sponsors).

*Factor 7. Purpose of Contacts -- Level 7-2 -- 50 points*

Contacts with patients include giving instructions on procedures necessary before taking tests, making appointments and distributing checks. The employee makes sure that patients who are often confused understand the instructions and appear at the clinic for which scheduled. Other contacts are primarily for providing or obtaining medical and general patient information.

*Factor 8. Physical Demands -- Level 8-1 -- 5 points*

Work is mostly sedentary with some walking to other units in the facility to obtain patient funds and transportation tokens. Some light carrying of patient records and crouching and bending to file records is required.

*Factor 9. Work Environment -- Level 9-2 -- 20 points*

The employee works in close proximity to mentally disturbed patients. There is a possibility of physical abuse.

**TOTAL POINTS -- 850**