Position description

Position | Records Technician (portfolio) | Division | Corporate Services
---|---|---|---
Group | Corporate Business | Location | Greenlane Clinical Centre, Auckland and other sites as required from time to time
Reports to | Senior Records Technician | Date | February 2018

Job purpose

Performing recordkeeping tasks, as per the Public Records Act 2005, pertaining to non-patient information and records.

Duties are grouped into portfolios which include recordkeeping activities across controlled, vital, in-house, off-site, digital, physical, active, inactive and archival information and records. Portfolios are shared and rotated. The incumbent is expected to be seen within their assigned groups as a specialist and first point of contact for recordkeeping advice and training.

Assist the senior records technician to achieve team projects and objectives.

Key responsibilities include

<table>
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<tr>
<th>Deliverables</th>
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<td>Processes are followed.</td>
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<td>Accurate data entry into databases and registers.</td>
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<td>Filing adheres to business standard.</td>
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<td>Able to find records easily because they are located and sorted correctly.</td>
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<td>Workload targets are met</td>
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<td>Good feedback from customers, colleagues and senior technicians.</td>
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Recordkeeping tasks related to the management of non-patient information and records.

- Learn the key undertakings and the documentation produced by assigned services within the portfolio in order to provide specialist professional advice
- Management of both hard copy and electronic information and records across organisation wide controlled, vital, in-house, off-site, digital, physical, active, inactive and archival material
- Identification of valuable records and information from within all online systems and organisation of that material and data according to predefined structures

Training

- Provide training to the organisations Recordkeeping Champions around filing in-house active-records and with boxing and listing inactive records ready for off-site storage or transfer to either Corporate Records or Archives New Zealand

Desk file and Instructional Material

- Establish and maintain desk file information to standardise transactional processing within allocated portfolios to assist training and handover
- Desk file reflects current transactional processing duties assigned to each portfolio.
<table>
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<tr>
<th>Information map and document key processes for use within the organisation</th>
<th>Current and relevant process information is available to the organisation</th>
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| **Communication**  
  - Develop and maintain effective networks in order to be able to assist with process improvements.  
  - Ensure appropriate and relevant communications are channelled to all affected parties | Effective networks maintained  
  - Customer queries resolved in an effective and efficient manner  
  - Communications are timely and effective. |
| **Relationship/ Stakeholder Management**  
  - Become familiar with the organisation structure for business owner identification and approval activities | Ownership details maintained within records registers. |
| **Advisement and support**  
  - Be available to provide specialist advice regarding business requirements and legislative obligations to recordkeeping champions.  
  - Be aware of and able to communicate the recordkeeping requirements in terms of statutory auditing and the fines for not meeting these | High quality advice and support provided as required.  
  - Resolution of customer queries at first point of contact in a timely manner  
  - Customer issues listened to, investigated and resolved |
| **Health and Safety**  
  - Take individual responsibility for Workplace Health and Safety under the Health and Safety in Employment Act 1992 | Company health and safety policies are read and understood and relevant procedures applied to work activities.  
  - Workplace hazards are identified and reported, including self-management of hazards where appropriate.  
  - Can identify who is the Health and Safety representative for the area. |
| **Secure Environment**  
  - Maintains the integrity of the secure space | Access pin codes to the area are kept confidential  
  - Confidential and sensitive information is secure at all times. |
| **Support portfolio back up**  
  - Take responsibility for additional portfolios of work as required.  
  - Be familiar with the position description and objectives of the Senior Records Technician and support the completion of these tasks and objectives.  
  - Act in the higher position if required to cover leave or vacancies. | Portfolio work is completed and agreed outcomes are delivered  
  - Team objectives are met |
| **Major challenges** |  
  - Uncovering information and documentation pertaining to the organisations existing records repositories, registers and transmittal lists  
  - Recommending consistency of business process approach where differing processes are in use  
  - Building strong customer relationships where none currently exist  
  - Keeping pace with changes to legislative obligations and business requirements. |
| **Delegated authorities** |  
  - Financial authority: Nil  
  - Direct reports: None  
  - Area of impact: Organisation wide  
  - Regional and national alignment |
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<th>Person Specification</th>
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<td><strong>Education &amp; Qualifications</strong></td>
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<td>Professional</td>
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<td>Working for ADHB – Expectations of Employees</td>
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**Citizenship**
All employees are expected to contribute to the innovation and improvement of Auckland District Health Board as an organisation. This means:
- Using resources responsibly
- Models ADHB values in all interactions
- Maintaining standards of ethical behaviour and practice
- Meeting ADHB’s performance standards
- Participating in organisation development and performance improvement initiatives
- Helping to develop and maintain Maori capability in ADHB, including developing our understanding of the Treaty of Waitangi and ways in which it applies in our work
- Raising and addressing issues of concern promptly

**The Employer and Employee Relationship**
We have a shared responsibility for maintaining good employer/employee relationships. This means:
- Acting to ensure a safe and healthy working environment at all times
- Focusing our best efforts on achieving ADHB’s objectives
- The role description will be reviewed regularly in order for it to continue to reflect the changing needs of the organisation. Any changes will be discussed with the position holder before being made.
- Annual objectives and performance measures will be set each year during the annual performance planning and development meeting.

**Consumer/Customer/Stakeholder Commitment**
All employees are responsible for striving to continuously improve service quality and performance. This means:
- Taking the initiative to meet the needs of the consumer/customer/stakeholder
- Addressing our obligations under the Treaty of Waitangi
- Involving the consumer/customer/stakeholder in defining expectations around the nature of the services to be delivered and the timeframe
- Keeping the consumer/stakeholder informed of progress
- Following through on actions and queries
- Following up with the consumer/customer/stakeholder on their satisfaction with the services

**Professional Development**
As the business of ADHB develops, the responsibilities and functions of positions may change. All staff are expected to contribute and adapt to change by:
- Undertaking professional development
- Applying skills to a number of long and short term projects across different parts of the organisation
- Undertaking such development opportunities as ADHB may reasonably require