

Job Description

Job Title:	Clinical Records Evaluator
Department:	AccessAbility Services
Reports To:	Manager, Student Accommodations
Jobs Reporting:	None
Salary Grade:	USG 10
Effective Date:	June 2021

Primary Purpose

The Clinical Records Evaluator is responsible for the initial vetting, verifying, reviewing, and assessing of medical documentation and psycho-educational assessments from registered health professionals to determine students' eligibility for academic accommodations with AccessAbility Service. The incumbent will ensure compliance with Ministry requirements, provincial human rights law and industry standards by using clinical judgement to design an initial individualized accommodation plan that ensures the University of Waterloo is fulfilling its legal duty to accommodate. As a Subject Matter Expert on Academic Accommodations, the Clinical Records Evaluator determines whether the University has the duty to accommodate and then determines eligibility for accommodations based on clinical records. The incumbent oversees compliance and mitigates risk, with the University's responsibilities under the Ontario Human Rights Code (OHRC) and its regulations.

The incumbent provides leadership to the Accommodation Consulting team in regard to analysis and interpretation of clinical records for the purpose of designing academic accommodation plans for students registered with AccessAbility Services that uphold legal requirements particularly in challenging, litigious, and/or complex cases. Collaboration with other internal and external campus partners is critical to providing holistic support to students.

Key Accountabilities

Medical/Clinical Documentation Review (analysis and interpretation)

- Conducts the initial review of all clinical records (medical/habilitative documentation and test results) from registered health professionals submitted by students seeking to register with AccessAbility Services to determine eligibility for academic accommodation.
- Analyzes and assess clinical records to develop the student's initial academic accommodation plan as well as determine eligibility for funding opportunities and other exemptions.
- Determines if clinical records are incomplete, inconsistent, or suspicious and seek clarification from registered health professionals and other members of the circle of care as appropriate to ensure accuracy of information, accountability and academic integrity.
- Make recommendations to registered health professionals regarding the need for additional supportive interventions and extended evaluations.
- Extract information from clinical records to provide a clinical assessment and recommendations that supports the development of a students' academic accommodation plan.
- Provide leadership in interpretation and application of assessments and documentation to cross-campus units.
- Ensure the ongoing eligibility of students for accommodations and/or exemptions and appropriate documentation requirement as per legislation and university requirements.

Clinical Leadership for the Accommodation Consulting Team

- Provide expertise and leadership to the Accommodation Consulting team in regard to analysis and interpretation of clinical records for the purpose of designing academic accommodation plans for students registered with AccessAbility Services that uphold legal requirements particularly in

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challenging, litigious, and/or complex cases.

- Provide clinical advice to the Accommodation Consultants on ways to manage challenging, litigious, and/or complex cases, and in some instances, assume responsibility for the case.
- Work closely with other units as appropriate (e.g., faculties, Health Services, Counselling Services) to provide holistic support to students with disabilities in crisis.
- Set consistent and professional standards including guidelines for documentation, leadership in interpretation and application of assessments and medical documentation, advising practice, processes and accommodation planning with students.

Ongoing Consulting on Complex Disability-related Issues/Needs

- Consulting with students and advising around complex issues related to specific disabilities.
- Working closely with other units (e.g., faculties, Health Services, Counselling Services) to provide holistic care and support for students with disabilities in crisis or requiring additional support.
- Using clinical judgement to refer student to on and off campus support services, including referrals for psycho-educational assessments, counselling, and academic support.
- Consulting with students seeking to appeal (petitions) and/or defer exams on the basis of disability. Using clinical judgement to make recommendations to instructors/department regarding these issues.
- Working with students to develop the skills necessary to self-advocate and access campus community resources that can support their academic success.

Developing and Facilitating Academic Accommodations

- Conducting bio-psycho-social interviews with students to determine how their functional limitations influence an academic need for accommodation
- Using medical documentation, clinical judgement, Ministry requirements, provincial legislation, and standards of practice to design appropriate and individualized academic accommodation plans on a temporary or ongoing basis
- Counselling students on academic accommodations as it relates to their disability
- Screening (for suspected disabilities learning disabilities, mental health and ADHD) and making referrals to appropriate services
- Ongoing clinical assessments of students to determine any changes in condition and accommodations requirements (such as academic recovery planning) as well any identification of any internal/external supports
- Provides consultation between students, faculty, academic advisors/coordinators and other campus partners regarding the provision of accommodations and student support.
- Mitigating legal risk by ensuring compliance by university partners through consultation, guidance and feedback
- Collaborating with AccessAbility Services Adaptive Technologist and Learning Strategist to ensure students' learning needs are supported.
- Generate accommodation summaries for students upon request for use with petitions, appeals, or ongoing education.
- Consult with other post-secondary institutions regarding accommodation history and or future needs.
- Using clinical judgement to consider (and mitigate) the implications of other variables on the accommodation process including whether the student is an international student, graduate student, cooperative education student, and so forth.
- Working with students registered with AccessAbility Services to design and implement appropriate academic accommodation plans on a temporary or ongoing basis.

Handling Sensitive Materials

- Organize and direct the return of clinical records to the intended party in a secure manner (appropriate storage and movement of confidential documents).
- Ensure access to secure documents are controlled appropriately.

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- Ensure data accuracy and document integrity.
- Appropriately use and maintain confidential health and education records in accordance with University policy and relevant Privacy legislation.
- Effectively uses systems and technology to accurately and efficiently manage student medical documentation.

Collaborating with Partners and Key Stakeholders

- Consult with academic units and support service units to understand their documentation-review needs and to determine a documentation review process that is streamlined and efficient.
- Consult with students to facilitate their application or submission for exemption, accommodation, etc.
- Consult with academic units and support service units (e.g., faculties, Health Services, Counselling Services) related to individual student accommodations or applications, and to offer guidance and advice regarding student specific issues as they arise.
- Communicate and collaborate with various cross-campus partners to review processes regularly and ensure quality.
- Develop and leverage positive relationships with appropriate on and off campus stakeholders.
- Provide proactive, professional and effective communications strategies with students registered with the office as well as the general student body, parents, instructors and other key stakeholders as appropriate.
- Utilize proactive, professional and effective communication strategies with students registered with AccessAbility Services as well as the general study body, parents, instructors, and other key stakeholder as appropriate.

**All employees of the University are expected to follow University and departmental health and safety policy, procedures and work practices at all times. Employees are also responsible for the completion of all health and safety training, as assigned. Employees with staff supervision and/or management responsibilities will ensure that assigned staff abide by the above, and actively identify, assess and correct health and safety hazards, as required.*

Required Qualifications

Education

- Graduate degree in either Rehabilitative Health Sciences (e.g., Occupational Therapy), Nursing, Social Work, Psychologist, or related field.
- Individual must be registered with a professional college/society recognized in Ontario.

Experience

- Experience reviewing medical documentation, psycho-educational assessments, and habilitative documentation and test results from registered health professionals to determine a support plan.
- Experience in a student-focused (secondary or post-secondary school context) environment.
- Experience providing accommodations, academic support, or services to persons with disabilities, preferably postsecondary students with disabilities.
- Experience and/or training in supporting persons in crisis and securing appropriate support, preferably in a postsecondary environment.

Knowledge/Skills/Abilities

- Working knowledge of the Registered Health Professionals Act (1991) and/or the Social Work and Social Service Work Act (1998) and control acts.
- Working knowledge of privacy regulations.
- Familiarity with the implications of specific disabilities at the post-secondary level.

- An understanding of how the symptoms or functional limitations of a disability interferes with an individual's daily functioning.
- Proven ability to work independently and as a team member in a busy and inter-disciplinary environment.
- Excellent communication (oral and written) skills.
- Superior organizational, problem-solving and interpersonal skills required.
- Proven ability to provide solution-focused interventions.
- Negotiation and mediation skills is an asset.
- Basic knowledge of MS Word, Excel, and PowerPoint
- Familiarity using databases for case management.

Nature and Scope

- **Contacts:** Internally, this position interacts regularly with the other AccessAbility Services staff, many departments across campus (Registrar's Office, Counselling Services, Health Services, Residence/housing, Centre for Teaching Excellent, Centre for extended Learning, etc.) and the six faculty units. Externally, this position may interact with external agencies and/or practitioners.
- **Level of Responsibility:** The Clinical Records Evaluator is responsible for the initial review of all clinical records (medical/habilitative/psychological/psycho-educational documentation) pertaining to a student's disability status and functional limitations to determine eligibility for academic accommodations as per the Ontario Human Rights Code. The incumbent is responsible for determining the most appropriate individualized accommodation plan for students with various disabilities based on the clinical records, seeking advice from the Manager, Clinical Records Evaluator when needed. The Clinical Documentation Evaluator is the subject matter expert on matters of disability-based academic accommodations and is responsible for the thorough and accurate review of clinical records, ensuring validity and accuracy of documentation. The incumbent is responsible for maintaining extensive knowledge related to the Ontario Human Rights Commission and its changing policies and procedures for accommodating students with disabilities in the academic environment. The incumbent uses legal and institutional knowledge when advising students and the University to offer accurate guidance. The incumbent exercises discretionary authority to provide advice and solutions to issues and concerns raised by members of the University community, often with little lead time, in litigious and/or complex situations. This position is also responsible and accountable for the complex execution and implementation of all disability-related accommodations for students at the University of Waterloo. The incumbent has a high degree of access to confidential materials, and as a result is responsible for the secure and confidential management of student medical documentation.
- **Decision-Making Authority:** Decision-making authority for all items outlined above. The Clinical Records Evaluator uses evidence-based practice, Ontario Human Rights Code, the Ontario Human Rights Commission policies and regulations to determine whether students are eligible for academic accommodations from AccessAbility Service. The incumbent determines the initial, individualized accommodation plan based on a thorough review of the clinical records. The incumbent performs her/his duties conscientiously and responsibly, adhering to the ethics of their profession as well as the duty to accommodate under the OHRC. Overly complex cases are escalated to the Manager, Clinical Records Evaluator.
- **Physical and Sensory Demands:** This role in an office setting involves minimal physical demands and moderate sensory effort resulting in slight fatigue, strain, or risk of injury. Exposure to a fast-paced service-oriented environment.
- **Working Environment:** The position is exposed to stress and pressure associated with administrative responsibilities in a clinical setting. It involves moderate psychological risk resulting from difficult and unavoidable exposure to disagreeable and uncomfortable environmental and psychological conditions. Risk of exposure includes: verbally and physically aggressive individuals; individuals dealing with a mental health crisis (including suicidal ideation and immediate risk of harm to self and others).

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Located indoors in a comfortable, fast-paced office environment populated by clinical, administrative staff, as well as clients (University of Waterloo students, staff, faculty, and student family members). There may be unusual hours or schedules, multiple and/or tight deadlines beyond one's control and constant interruptions (e.g. phone calls, e-mails, urgent support requests, varying student volumes at different times of the year). Requires flexibility to occasionally shift working hours to include evenings or to accommodate required staffing levels.