

# **COUNTY OF SOLANO**

## **PATIENT BENEFITS SPECIALIST**

Rev.10/02

### **DEFINITION**

Under general direction, interviews Mental Health clients and their families to assess financial status and determine potential eligibility for Federal, State and County assistance; performs related duties as required.

### **DISTINGUISHING OR CLASS CHARACTERISTICS**

Patient Benefits Specialist is located in the Mental Health Division of the Health and Social Services Department. It is characterized by the responsibility to interview severely mentally ill clients to elicit financial information. Patient Benefits Specialist is distinguished from the Eligibility Benefits Specialist series in that the latter is responsible for determining initial and continuing eligibility of applicants for public assistance programs.

### **EXAMPLES OF DUTIES**

Depending on assignment, duties may include but are not limited to the following:

1. Interviews Mental Health clients in acute psychiatric hospitals and other facilities to determine potential for eligibility for Federal, State and County assistance including County Medical Services Program (CMSP), Medi-Cal, Social Security Income (SSI), State Disability Insurance (SDI), Short-Doyle or to investigate existing health insurance coverage. Works with client and/or client's family to complete applications for CMSP, SSI, SDI, Short-Doyle and Medi-Cal and obtains needed verifications for CMSP or Medi-Cal application approval.
2. Interprets provisions and requirements of Federal, State and County aid programs to patients and explains their rights and obligations with regard to financial coverage for medical services; submits CMSP or Medi-Cal applications to the Health and Social Services Department, Eligibility Division for processing; contacts Health and Social Services Department Eligibility Benefit Specialists to provide verification for application approval; contacts the Health and Social Services Department for the Napa Liaison Office to obtain information regarding needed verification and submits such verifications for immediate need grants on Medi-Cal pending applications for clients who need placement in long term facilities.
3. Refers clients to the Social Security Administration and Health and Social Services Department to determine patients' eligibility for medical coverage and initiates the necessary financial documents within time limits specified by the agency.

**EXAMPLES OF DUTIES (continued)**

4. Reviews billings for client pharmacy and ambulance usage; contact hospital accounting departments to notify them of CMSP or Medi-Cal approval; provides hospitals with billing information concerning client insurance coverage and related billing problems; tracks clients to insure continued eligibility; establishes and maintains files for each client; insures completeness of client application and records.
5. Reviews and summarizes patient admissions, discharges and utilization data; prepares reports to summarize activity within County's contract with private hospitals; prepares vendor claims to free standing psychiatric facilities; prepares other reports as requested.
6. Provides information and makes routine referrals to resources available through the County and within the community which help meet mental health needs; acts as patient benefit liaison between Solano County Mental Health Services and County contract hospitals, Health and Social Services Department, Social Security Administration, Department of Veterans Affairs and the Public Guardian's Office.

**QUALIFICATION GUIDELINES**

**Education and/or Experience**

A minimum of one year of public contact experience, equivalent to an Eligibility Benefits Specialist I or Employment Resources Specialist I, which involved processing financial or personal history documents and interpreting applicable laws, rules, and regulations which demonstrates possession of and competency in requisite knowledge and abilities

Completion of 60 semester or 90 quarter units from an accredited college or university preferably in general education, business, finance, social science, or a closely related field may be substituted for the one year of required experience.

**Knowledge/Abilities**

Considerable knowledge of the principles and techniques of interviewing, obtaining and recording patient information; public contact, communication and interviewing techniques; services provided by the County; organization of public health care services and the inter-relationship with other departments, agencies and community resources; record maintenance and case management techniques; effective techniques for dealing with people of diverse socio-economic backgrounds and temperaments, as well as hostile and uncooperative clients.

**KNOWLEDGE/ABILITIES (Continued)**

Ability to apply and explain complex regulations and procedures; make appropriate recommendations concerning client medical coverage to Mental Health professionals and to such agencies as the Social Security Administration, Welfare Department and private insurance companies; to make arithmetical computations, accurately record information and complete complex forms; follow complex instructions; read and understand complex regulations and procedures; deal with hostile and uncooperative clients; make decisions and independent judgments; determine the appropriate course of action in emergency or stressful situations; maintain control in tense and emotional situations; understand program objectives in relation to departmental goals and procedures; research regulations, procedures and/or technical reference materials; maintain confidentiality of information; communicate effectively with people of diverse socio-economic backgrounds and temperaments; conduct interviews to elicit financial information and medical insurance coverage; make referrals to local and regional providers of social, medical and/or other specialized services.

**SPECIAL REQUIREMENTS**

Possession of or ability to obtain a valid Class C California driver's license is required.

**SUPPLEMENTAL INFORMATION**

Independent travel will be required.

Selectees for employment must as a condition of employment sign a statement agreeing to comply with Section 11166 of the California Penal Code relating to child abuse reporting.

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Department Head

Date