

DUTY STATEMENT
DSH3002 (Rev. 01/2020)



California Department of
State Hospitals

Box reserved for Personnel Section

	RPA #	C&P Analyst Approval	Date	
Employee Name	Division Administrative Support Services			
Position No / Agency-Unit-Class-Serial 502-544-5393-XXX	Unit Trust Office			
Class Title Analyst II	Location Department of State Hospitals - Patton			
Subject to Conflict of Interest ☒ Yes ☐ No	CBID R01	Work Week Group: 2	Pay Differential	Other
Briefly (1 or 2 sentences) describe the position's organizational setting and major functions Under the supervision of the Trust Officer, performs a broad range of interdisciplinary activities that relate to technical analyst work of average difficulty such as benefit evaluation, policy analysis; systems development; planning, training; completes field work on a regular basis: continually provides consultative services to management and others; and do other related work. The Analyst II works at the full journey level, serves as the subject-matter expert generalist on patient benefits and performs as a lead staff within the State Hospital Trust Office setting.				
% of time performing duties	Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first; percentage must total 100%. (Use additional sheet if necessary).			
40%	DEPARTMENTAL RESPONSIBILITY Interprets and analyzes the principles and techniques of Social Security and Medicare benefit eligibility, application, enrollment, payment, and appeal process. Understands and applies Special Orders, W&I Code, Internal control guidelines, and DSH-Patton policies and procedures and all local, state, and federal rules and regulations. Analyzes Medicare information, processes applications, and completes requirements for Social Security Administration (SSA) on all new admissions. Researches incomplete information for potential sources of benefit information and supporting evidence in Noridian, Medslite and other county/state government websites. Interviews unit staff, outside sources, and patients to obtain benefit information; gathers, tabulates, and analyzes benefit data and prepares charts and reports. Responsible for enrolling 65 and over patients in Medicare if eligible. Investigates patient status with Medicare to ensure there is no interruption in services. Works with SSA to correct incarcerated status as well as any other claim processing issues that pertain to Medicare coverage.			

	Processes requests from Social Security: medical records, payee applications, State Security Disability Income (SSDI) information, work histories, representative payee reports, research patient benefit background information and Social Security numbers. Responds to SSA overpayment notices. Process Inquiries/Client Status Reports to Social Security for all new admissions as mandated by Federal Law. Post and update all Social Security, Medicare, Conservatorship, and Veteran Administration information to Clinical Information System (CIS). Cost Recovery System (CRS), Keefe System and maintain various logs. Act as liaison with Social Security Administration. Monitor submitted information requests and follow up with Social Security Administration on outstanding information requests. Perform routine audit and provide report analysis of patient Medicare information in trust databases including CRS, CIS and internal logs. Track Medicare premium payments, identify trends, and prepare reports for management. Prepare monthly reports and graphs on Medicare enrollment including number of patients contacted for Medicare enrollment, patients who were denied coverage, and number of patients successfully enrolled in a Medicare plan. Analyze data and follow up with patients who denied coverage at a later date. Evaluate reports monthly for efficiency trends and provide recommendations to management on potential cost savings for Medicare patients.
30%	Develop creative solutions and provide recommendations for appeals when Medicare denies benefits. Interacts with and provides Medicare informational support to medical bill payment staff in Budgets department, medical project coordinator in Medical Services Department, and billing staff In Health Information Management Department (HIMD). Assists with the interview process when patients are ready for discharge. Collaborates with unit social workers and assists patients with the completion of Pre-Release Supplemental Security Income (SSI) applications. Evaluate all Medicare/Social Security communication received and apply appropriate action. Assists employees (by phone or in person) with any questions regarding patient trust account issues.

	Accounts for all incoming/outgoing checks and money orders through the receipted locked program bags process. Recognizes priority items to ensure timely processing and expedites orders as required.
15%	LEADERSHIP REPRESENTING THE TRUST DEPARTMENT At the direction of the Trust Officer, leads junior staff, included but not limited to, Analyst I, Office Technicians, Retired Annuitant, and Student Assistant as well as temporary personnel. May act as team leaders or coordinate the efforts of representatives of various governmental agencies on larger projects. Makes recommendations and/or assists the Supervisor I/Trust Officer in the preparation of various analytical reports, such as the Medicare Enrollment Status Report, Governing Body Report, various Patient Cost Recovery Section (PCRS) inquires and reports, etc. Presents patient data to Quality Council meeting quarterly or as needed. May represent the Trust Officer in his/her absence and serves as a liaison on policy matters with Trust Office staff, control agencies, and other outside parties. Applies hospital Policy Directives, Department of State Hospitals Trust Office Manual, State Administrative Manual, and other reference materials as necessary to ensure proper course of action and accuracy of documents.
15%	INTERPERSONAL RELATIONSHIPS Performs problem solving and troubleshooting of daily activities in order to achieve the department's goals and objectives. Maintains a positive rapport with Department of State Hospitals, Patient Cost Recovery Services (PCRS), Social Security Administration, hospital staff, outside agencies, vendors, and the public in written and verbal correspondence. Interacts with patients, all levels of management, supervisors, line employees, vendors, and public members. Contacts and provides consultative and analytical service to technical personnel at DSH-Patton, other hospitals, Headquarters staff, local, state, and federal agencies. Exercises initiative, judgment, and responsibility when dealing with all staff, patients, and the public.

	Takes initiative to communicate with supervisor and co-workers to ensure smooth flow of operation; maintains proper documentation when needed; and follows through on problem resolutions. Promotes and maintains a collaborative relationship with staff, thereby enhancing work productivity. Remains flexible with work schedules to meet the needs of the hospital. Analyzes, processes, and logs Board of Control Governmental Claims. Reviews, research, and resolves the circumstances of the loss/damaged through the Governmental Claim Process for the replacement of alleged loss or damaged property from patients, staff, contractors, visitors, or any other persons seeking reimbursement. Prepares competitive bids for purchases within department. Update departmental policy and procedure manuals as needed. Performs other duties as required.
Required Competencies	SUPERVISION RECEIVED: Received the supervision from the Supervisor I. SUPERVISION EXERCISED: Acts as a lead over junior staff, including but not limited to Program Technicians, Office Technicians, and Student Assistant in the Patient Benefits Section of the Trust Office. ABILITY TO: Reason logically and creatively and utilize a variety of analytical techniques to resolve governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; and gain and maintain the confidence and cooperation of those contacted during the course of work. KNOWLEDGE OF: Principles, practices, and trends of public and business administration, management, and supportive staff services such as budgeting, personnel, and management analysis; and governmental functions and organization. TECHNICAL PROFICIENCY (SITE SPECIFIC) This position utilizes various office equipment and computers. The Analyst must have a working knowledge and be able to operate the following: calculators, computers, printers, copiers, phones, etc. in addition to providing technical expertise for consultation and guidance to the Supervisor I.

	ANNUAL HEALTH REVIEW: All employees are required to have an annual health review and TB test or whenever necessary to ascertain that they are free from symptoms indicating the presence of infection and are able to safely perform their essential job functions. INFECTION CONTROL: Applies knowledge of correct methods of controlling the spread of pathogens appropriate to job class and assignment. HEALTH AND SAFETY: Activity supports a safe and hazard free workplace through practice of personal safety and vigilance in the identification of safe or security hazards. THERAPEUTIC STRATEGY INTERVENTION (TSI): Supports safe working environment; practices the strategies and interventions that promote a therapeutic milieu; applies and demonstrates knowledge of correct methods in the management of assaultive behavior in accordance with policy. CULTURAL AWARENESS: Demonstrates awareness to multicultural issues in the work place that enable the employee to work more effectively. RELATIONSHIP SECURITY: Demonstrates professional interactions with patients, and maintains therapeutic boundaries. Maintains relationship security in the work area; takes effective action and monitors, per policy, any suspected employee/patient boundary violations.
License or Certification	Not applicable.
Training	The employee is required to keep current with the completion of all required training.
Other Information	Regular and consistent attendance is critical to the successful performance of this position due to the heavy workload and time-sensitive nature of the work. The incumbent routinely works with and is exposed to sensitive and confidential issues and/or materials and is expected to maintain confidentiality at all times. The Department of State Hospitals provides support services to facilities operated within the Department. A required function of this position is to consistently provide exceptional customer service to internal and external customers. The employee is required to work any shift and schedule in a variety of settings and security areas throughout the hospital and may be required to work overtime and float to other work locations as determined by the operational needs of the hospital. All employees are required to have an annual health review and repeat health reviews whenever necessary to ascertain that they are free from symptoms indicating the presence of infection and are able to safely perform their essential job functions.

	<u>Statement of Economic Interests / Form 700 Requirements:</u> The Political Reform Act requires employees who serve in this position to be designated in our agency conflict-of-interest code to file a Statement of Economic Interest (Form 700). Your assuming office statement is due within 30 days of Assuming Office, Annually and within 30 days of Leaving Office. The Annual Form 700 due date is determined by the Fair Political Practices Commission and is generally due on or about March 31 of each year. The statements must be submitted to the DSH-Patton Filing Officer. These statements are public access documents. You will receive reminders from the DSH-Patton Filing Officer regarding completion of the statements; however, it is your responsibility to ensure you are compliant with all regulations and requirements. For additional information regarding the Statement of Economic Interests or regulations, please contact the DSH-Patton Filing Officer. <u>Ethics Training and Compliance:</u> Pursuant to Assembly Bill 3022 and Government Code 11146.4, employees required to file a Form 700 Statement of Economic Interests must complete an Ethics orientation training course within six months of assuming a Form 700 covered position, and every two (2) years thereafter, by December 31 of each odd numbered year. The Ethics training governs the official conduct of state officials. You will receive reminders from the DSH-Patton Filing Officer regarding completion and documentation of the training; however, it is your responsibility to ensure you are compliant with the required training. Your Ethics training record and certificates of completion are public access documents. For additional information regarding the Ethics training and regulations regarding this requirement, please contact the DSH-Patton Filing Officer.
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	I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the Office of Human Rights).		
	_____ Analyst II (Employee Signature)	_____ Print Name	_____ Date
	I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.		
	_____ Supervisor I (Supervisor Signature)	_____ Print Name	_____ Date
	_____ Classification Reviewing Supervisor Signature	_____ Print Name	_____ Date

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Other 			
Briefly (1 or 2 sentences) describe the position's organizational setting and major functions Under the supervision of the Trust Officer, performs a broad range of interdisciplinary activities that relate to technical analyst work of average difficulty such as benefit evaluation, policy analysis; systems development; planning, training; completes field work on a regular basis; continually provides consultative services to management and others; and do other related work.			
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30%	Develop creative solutions and provide recommendations for appeals when Medicare denies benefits. Interacts with and provides Medicare informational support to medical bill payment staff in Budgets department, medical project coordinator in Medical Services Department, and billing staff In Health Information Management Department (HIMD). Assists with the interview process when patients are ready for discharge. Collaborates with unit social workers and assists patients with the completion of Pre-Release Supplemental Security Income (SSI) applications. Evaluate all Medicare/Social Security communication received and apply appropriate action. Assists employees (by phone or in person) with any questions regarding patient trust account issues. Accounts for all incoming/outgoing checks and money orders through the receipted locked program bags process. Recognizes priority items to ensure timely processing and expedites orders as required.
15%	LEADERSHIP REPRESENTING THE TRUST DEPARTMENT May act as team leaders or coordinate the efforts of representatives of various governmental agencies on larger projects. Provides input and/or assists the Supervisor I/Trust Officer in the preparation of various analytical reports, such as the Medicare Enrollment Status Report, Governing Body Report, various Patient Cost Recovery Section (PCRS) inquiries and reports, etc. May attend meetings on policy matters with Trust Office staff, control agencies, and other outside parties.

	Applies hospital Policy Directives, Department of State Hospitals Trust Office Manual, State Administrative Manual, and other reference materials as necessary to ensure proper course of action and accuracy of documents.
15%	INTERPERSONAL RELATIONSHIPS Performs problem solving and troubleshooting of daily activities in order to achieve the department's goals and objectives. Maintains a positive rapport with Department of State Hospitals, Patient Cost Recovery Services (PCRS), Social Security Administration, hospital staff, outside agencies, vendors, and the public in written and verbal correspondence. Interacts with patients, all levels of management, supervisors, line employees, vendors, and public members. Contacts and provides consultative and analytical service to technical personnel at DSH-Patton, other hospitals, Headquarters staff, local, state, and federal agencies. Exercises initiative, judgment, and responsibility when dealing with all staff, patients, and the public. Takes initiative to communicate with supervisor and co-workers to ensure smooth flow of operation; maintains proper documentation when needed; and follows through on problem resolutions. Promotes and maintains a collaborative relationship with staff, thereby enhancing work productivity. Remains flexible with work schedules to meet the needs of the hospital. Performs other duties as required.
Required Competencies	SUPERVISION RECEIVED: Receives supervision from the Supervisor I and may receive instruction from Analyst II. SUPERVISION EXERCISED: N/A ABILITY TO: Reason logically and creatively and utilize a variety of analytical techniques to resolve governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; and gain and maintain the confidence and cooperation of those contacted during the course of work.

	KNOWLEDGE OF: Principles, practices, and trends of public and business administration, management, and supportive staff services such as budgeting, personnel, and management analysis; and governmental functions and organization. TECHNICAL PROFICIENCY (SITE SPECIFIC) This position utilizes various office equipment and computers. The Analyst must have a working knowledge and be able to operate the following: calculators, computers, printers, copiers, phones, etc. in addition to providing technical expertise for consultation and guidance to the Supervisor I. ANNUAL HEALTH REVIEW: All employees are required to have an annual health review and TB test or whenever necessary to ascertain that they are free from symptoms indicating the presence of infection and are able to safely perform their essential job functions. INFECTION CONTROL: Applies knowledge of correct methods of controlling the spread of pathogens appropriate to job class and assignment. HEALTH AND SAFETY: Activity supports a safe and hazard free workplace through practice of personal safety and vigilance in the identification of safe or security hazards. THERAPEUTIC STRATEGY INTERVENTION (TSI): Supports safe working environment; practices the strategies and interventions that promote a therapeutic milieu; applies and demonstrates knowledge of correct methods in the management of assaultive behavior in accordance with policy. CULTURAL AWARENESS: Demonstrates awareness to multicultural issues in the work place that enable the employee to work more effectively. RELATIONSHIP SECURITY: Demonstrates professional interactions with patients, and maintains therapeutic boundaries. Maintains relationship security in the work area; takes effective action and monitors, per policy, any suspected employee/patient boundary violations.
License or Certification	Not applicable.
Training	The employee is required to keep current with the completion of all required training.
Other Information	Regular and consistent attendance is critical to the successful performance of this position due to the heavy workload and time-sensitive nature of the work. The incumbent routinely works with and is exposed to sensitive and confidential issues and/or materials and is expected to maintain confidentiality at all times. The Department of State Hospitals provides support services to facilities operated within the Department. A required function of this position is to

consistently provide exceptional customer service to internal and external customers.

The employee is required to work any shift and schedule in a variety of settings and security areas throughout the hospital and may be required to work overtime and float to other work locations as determined by the operational needs of the hospital. All employees are required to have an annual health review and repeat health reviews whenever necessary to ascertain that they are free from symptoms indicating the presence of infection and are able to safely perform their essential job functions.

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the Office of Human Rights).

Analyst I
(Employee Signature)

Print Name

Date

I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.

Supervisor I
(Supervisor Signature)

Print Name

Date

Classification

Reviewing Supervisor Signature

Print Name

Date