



JOB TITLE: Connections Case Manager

DEPARTMENT: Finance

REPORTS TO: Patient Access Manager

Statement of Duties

Duffy Health Center is a patient-centered medical home and every role requires functioning effectively using a team-based approach. The Connections Case Manager is responsible for processing eligibility for insurance for patients and clients at Duffy Health Center. Work includes ensuring the accuracy and appropriateness of information received, researching and solving problems, explaining scope of services available and providing resources and guidance where needed. Work also includes conducting patient interviews and assessing patient needs, advocating for patients, coordinating with community groups, state and federal agencies, and local organizations to assist patients in obtaining health insurance and other appropriate social services, resources, and assistance. This position is deemed non-essential* in the DHC Emergency Operations Plan.

Position Functions

The statements contained in this job description reflect general details, as necessary, to describe the principal functions of this job, the level of knowledge and skill typically required, and the scope of responsibility. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties, as assigned, including work in other functional areas to cover absences or provide relief, to equalize peak work periods or otherwise to balance the workload.

1. Meets with patients via phone or in person to assess needs and determine eligibility for services, providing resources and guidance where needed.
2. Reestablish returning patients/clients with services provided by Duffy Health Center.
3. Explains Duffy Health Center's scope of services, including Integrated Care Model to patients.
4. Gather, review, process, and input electronic health record into an electronic medical record to register a client/patient and update as needed.
5. Assist patients in completing applications for insurance, gathering any verifications required for applications, following up on the status of verifications, applications, and documents, working to fix any discrepancies.
6. Works collaboratively with members of the multi-disciplinary team at Duffy Health Center in order to provide integrated care.



7. Coordinates with patients, providers, agencies, and different organizations to obtain resources and referrals.
8. Maintains confidential records of benefits/referral management activities and records information in the agency's electronic medical record in a timely fashion.
9. Prepares reports as required by Duffy Health Center, grant source, and as others required.
10. Assist those who are not eligible for services through Duffy Health Center in finding resources for other coverage opportunities.
11. Continue with patient/client follow up to ensure insurance coverage, status of application, and becoming established as a patient/client.
12. May conduct outreach services to at-risk individuals assigned to Duffy Health Center.

Recommended Minimum Qualifications

Minimum Education and Experience

A candidate for this position must have a High School Diploma or GED. At least 1-2 years' experience working with health insurance, either in a medical front desk position or billing position, is preferred. Prior case management experience is helpful but not required.

License/Certificates

Must become a Certified Application Counselor after hired. Training and certification provided by Massachusetts Health Connector, facilitated through Duffy Health Center.

Requirements under the DHC Emergency Operations Plan

During a declared Emergency, staff deemed as Essential Personnel are expected to work onsite at Duffy Health Center and Non-Essential Personnel are expected to work remotely. This position is Non-Essential and therefore this position may be expected to work remotely' during a declared emergency.

Knowledge, Skills, and Abilities

A candidate for this position should have the following:

Knowledge:

- Readily available services to clients/patients



- Basic knowledge of state and federally sponsored insurance programs including MassHealth, Medicare and Health Safety Net.
- Local groups and organizations providing social services
- Insurance protocols and offerings
- Electronic medical record systems
- HIPAA regulations.

Abilities:

- Work effectively within a team and independently
- Maintain composure in challenging situations; Separate self from the personalization of challenging patients; interact effectively and appropriately with homeless and at-risk individuals
- Prioritize and manage multiple responsibilities
- Self-motivate, to strive for efficiencies and improvements
- Maintain confidentiality of information

Skill in:

- Effectively and efficiently troubleshooting patient/client needs
- Handling multiple priorities simultaneously in a timely manner
- Professional and appropriate communication skills, verbal and written
- Computer skills (e.g., Word, Excel, Microsoft etc.)
- Commit to the philosophy and mission of Duffy Health Center which serves the homeless and at-risk population, and to the team-based approach as part of PCMH

Accountability

The nature of work means that errors can be easily detected, usually by the employee. Consequences of errors, missed deadlines or poor judgment may result in minor confusion, involving minimal time and expense for correction.

Judgment

Well defined or detailed rules, instructions and procedures cover all aspects of work. Judgment involves choosing the appropriate practices, procedures, regulations, or guidelines to apply in each case.

Complexity

The work consists of simple, routine, or repetitive tasks and/or operations with few variations in established procedures.



Supervision Required

Under general supervision, the employee is familiar with the work routine and uses initiative in carrying out recurring assignments independently with specific instruction. The supervisor provides additional, specific instruction for new, difficult, or unusual assignments, including suggested work methods. The employee is expected to recognize instances which are out of the ordinary and which do not fall within existing instructions; the employee is then expected to seek advice and further instructions. Reviews and checks of the employee's work are applied to an extent sufficient to keep the supervisor aware of progress, and to insure that completed work and methods used are technically accurate and that instructions are being followed. In many cases, the work is self-checking, for example, requiring accounts to balance before proceeding.

Nature and Purpose of Contacts

Relationships with co-workers and the general patient population involving frequent explanation, discussion or interpretation of practices, procedures, regulations, or guidelines in order to render service, plan, or coordinate work efforts, or resolve operating problems. Other regular contacts are with patient/service recipients and employees of outside organizations such as vendors, banks and/or developers/contractors. More than ordinary courtesy, tact and diplomacy may be required to resolve complaints or deal with hostile, uncooperative, or uninformed persons.

Work Environment

The work environment involves everyday discomforts typical of offices, with occasional exposure to outside elements. Noise or physical surroundings may be distracting, but conditions are generally not unpleasant.

Physical Demands

Little or no physical demands are required to perform the work. Work effort principally involves sitting to perform work tasks, with intermittent periods of stooping, walking, and standing. There may also be some occasional lifting of objects (up to 30lbs.).

Motor Skills

Duties are largely mental rather than physical, but the job may occasionally require minimal motor skills for activities such as moving objects, computer and/or most other office equipment, typing, filing, sorting.

Occupational Risk

Duties generally do not present occupational risk with only occasional exposure to risk or stress. Minor injury could occur, however, through employee failure to properly follow safety precautions or procedures. Examples of injury include minor bruises from falls, minor cuts or burns, or minor muscular strains from lifting or carrying heavy equipment or materials.



Confidentiality

Has access to some confidential information obtained during performance of regular position responsibilities, where the effect of any disclosure would probably be negligible or where the full significance of the overall confidential matter would not be apparent in the work performed.

Essential*

*Employees designated as “essential,” a standard Incident Command term used in Emergency Management, typically work on-site to provide direct clinical care or management of such.

Non-essential*

*Employees designated as “non-essential,” a standard Incident Command term used in Emergency Management, typically work off-site remotely to provide either clinical or administrative support to clinical operations.