

Class Specifications  
for the Class:RESIDENT FINANCIAL COUNSELOR  
SR-15; BU:03Duties Summary:

Processes claims for the financial benefits of residents in a long-term care facility and safeguards their financial interests; determines the amount to charge for the maintenance and care of each non-indigent resident and follows up on delinquencies; and performs other related duties as assigned.

Distinguishing Characteristics:

Basic to the work of this class is a concern for the financial interests of residents in a long-term care facility as such interests affect their well-being. This work includes responsibility for obtaining financial benefits for residents and safeguarding their interest by reviewing their finances, reviewing financial claims against them, and authorizing unusual expenditures.

Also involved in the work is the maintenance of accounts for each resident for hospitalization costs and other related expenses. This includes inquiring into the financial status of the residents-and/or their families, and obtaining agreements to pay.

Examples of Duties:

Files claims with governmental agencies, insurance companies, benevolent associations and other groups, and obtains supporting information on behalf of residents; inquires into and obtains or arranges for the disposition of bills incurred by residents prior to admittance; arranges for the transfer of residents' funds from saving institutions to accounts at the facility; authorizes the signing by residents of checks and other business documents; meets with the representatives of governmental and other agencies regarding benefits available to individual residents; reviews reports on the family and financial status of residents and discusses such matters with facility social workers; informs families, guardians or agency representatives of laws and policies governing payment for resident care and hospital rates; conducts interviews, and verifies information on the financial status of residents' families; determines reasonable payments to be made of all or a portion of established maximum hospitalization costs, obtains informal agreements to pay and initiates billing; follows up on delinquencies and determines adjustments to be made; makes periodic review of each case and

determines adjustments to be made; and assists the facility business manager in general office operations.

Knowledge and Abilities Required:

Knowledge of: Interviewing techniques; credit and collection procedures; office practices and procedures; general financial benefits and allowances available to the indigent and elderly.

Ability to: Effectively interview and deal tactfully with residents, their families and others; obtain facts and establish reasonable charges based on maximum charges and the ability to pay; obtain the confidence and agreement to pay of residents and their families; consider the best interests of residents in establishing charges and processing claims for residents and other transactions for residents; and establish and maintain effective relationships with governmental agencies, benevolent associations and other groups.

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This is the first specification for the new class RESIDENT FINANCIAL COUNSELOR effective September 12, 2003.

APPROVED: \_\_\_\_\_  
JANICE WAKATSUKI  
VP/Director of Human Resources