



Position Title: Client Advocate I

Revised Date: Jan 2020

Supervisor: Executive Director

Status: Full Time Employment

Position Summary:

The Client Advocate is responsible for Cairn Health’s daily program activities to screen, qualify, and enroll clients in programs in a clear, accurate and concise manner. Client Advocates are the link for clients between Cairn Health, our referral/service provider partners, and community referral resources. The Client Advocate maintains strict client confidentiality in accordance with HIPAA, exhibits strong organizational and interpersonal skills, creates accurate vouchers, and prioritizes duties.

The Client Advocate is expected to make positive contributions and suggestions to improve workflow, routine organization, project completion, and plan for effective and efficient use of time while displaying exemplary client relation skills. The Client Advocate supports the mission and goals of Cairn Health in all work activities.

This is a full-time position. Hours are 8:15 a.m.-5:00 p.m. Monday through Friday with a 45-minute lunch hour generally from 12:00 p.m. to 12:45 p.m. This is not an all-inclusive listing of duties and is not a contract, expressed or implied.

Essential Functions of the Client Advocate are as follows:

General Intake Duties:

- Explain Cairn Health programs to clients and provide access to required client consent forms.
- Ensure Application Form is properly completed and help if needed.
- Review and verify accuracy of client data in our database.
- Evaluate client data to determine eligibility for services.
- Review Social Determinants of Health assessment with families to identify needs areas.
- Refer applicants to other social services agencies as appropriate.
- Monitor and control Cairn Health assistance to ensure service limits are not exceeded.
- Make all necessary follow up calls to clients, doctors and pharmaceutical companies daily.

Voucher Program for Prescriptions or Vision Care:

- Follow policies and procedures in the Direct Services Manual for Client Advocate service delivery.
- Verify that the client has a prescription with them or a refill available at the pharmacy.
- Verify information necessary to determine eligibility including limits available to the client as per the manual.
- Call pharmacies to verify price of drugs.

- Call and schedule eye appointments. Use the current Vision Care income guidelines to verify the cost of the exam and have the client sign an eye exam consent form.
- Complete the voucher for the service.
- Update the client file in the database.
- Utilize Funding Source information to correctly assign direct service expenses.
- Give the voucher to the client or fax it to the pharmacy and explain to client where they need to go to pick up their medications and/or the time of their scheduled eye appointment.
- Document in the notes section of the database.

#### PDP Program:

- Follow policies and procedures in the Direct Services Manual for Client Advocate service delivery.
- Verify eligibility for the Prescription Drug Program.
- Confirm in the prescription(s) that may be covered through the PDP program and doctor's name and address.
- Explain the PDP Administration fee and direct the client to the receptionist to collect the fee.
- Maintain a log to document the steps in the process and tracking the re-determination status.
- Update client notes in the database.

#### General Duties:

- Answer the phone when the receptionist is not available.
- Screen the calls properly and route them to the right staff members as necessary.
- Return all phone calls daily.
- Process advocate mail daily.
- Keep office and files clean and organized.
- Participate and support team activities and be a team player.
- Make positive contributions and suggestions to improve workflow.
- Keep all common areas clean and organized.

#### Other Duties:

- Assist in training volunteers.
- Assist in training new Client Advocates.
- Keep up-to-date and update management and staff on PDP changes.

#### Qualifications:

To perform this job successfully, the individual must be able to perform each essential duty satisfactorily. The requirements listed are representative of the knowledge, skill, and/or ability required.

#### Education and/or Experience:

High School Diploma or general education degree (GED) and one year of college coursework or equivalent experience required. Bachelor's degree preferred in human services or related field (may substitute appropriate work experience for education). Demonstrated competence in Microsoft Word, Excel, Microsoft Outlook (email and calendar). Ability to understand medical terminology is required.

Bilingual skills (English and Spanish fluency) are an asset.

Physical Requirements and Work Conditions:

While performing duties of this job, the employee is regularly required to sit; talk or hear; use hands to finger, handle, or feel. The employee is frequently required to reach with hands and arms. The employee is occasionally required to stand, walk, climb or balance, stoop, kneel, or crouch. The employee must occasionally lift and/or move up to 10 pounds. The employee in this position will use the telephone, computer and copier on a daily basis. The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Scope of client population:

Scope of clients served includes individuals of all ages, ethnic backgrounds and religions. Low income, uninsured, underinsured with transitional and chronic health conditions and lives or works in Sedgwick County.

**Cairn Health, Inc. is an Equal Opportunity Employer**

I have read the above job description and understand the expectations. I can perform the essential functions and meet the basic requirements.

Employee: \_\_\_\_\_ Date: \_\_\_\_\_