

job task analysis

Employer:	Stanislaus County
Occupation:	Patient Finance Counselor/Technician
Classification:	I, II
Company Contact:	Brenda Mercier
Company Address:	830 Scenic Drive Modesto, California 95353
Company Phone:	(209) 558-7199
Date Analysis Performed:	January 2000

Analysis Provided By: Lyle Andersen, PT
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3500 Coffee Road, Suite 3
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(209) 549-4626

Introduction:

The job description for this document was provided by Stanislaus County. The environmental factors, physical and functional demands for this Job Task Analysis were documented by Andersen & Baim Physical Therapy, Inc. The methodology for documentation consisted of on-site visits, using various measuring devices such as dynamometers and scales, as well as observation and interviews with employees and managers. A detailed record was made of the physical and functional demands of the job in terms of force pounds, weight, frequency, height, distance, anthropometric measurements, stamina, and degrees of range of motion. The determination of the frequencies of functional activities are based on standards provided by the National Institute for Occupational Safety and Health (NIOSH) and the Work Practice Guide for Manual Lifting (U.S. Department of Commerce, National Technical Information Service).

The Job Task Analysis is organized as follows: General work description and specific duties; safety requirements; uniform/equipment; required job-related knowledge, education, ability, and experience; union; environmental factors; and physical/functional demands.

General Work Description:

The frequency of the following activities may vary according to the physical requirements of the specific job tasks that the employee may be required to perform at random intervals.

Under the general supervision of the department manager, Patient Finance Counselor/Technician determines patient eligibility for medical needs of applying county residences. In addition, Patient Finance Counselor/Technician interviews inpatient and outpatient clients/patients, patient's families and/or patient representatives to gather information on financial resources for payment of medical services provided, verifies financial arrangements, information and insurance coverage, sets up payment plans, and performs related duties as required. Incumbents are responsible for hearing and implementing the regulations, policies and procedures pertaining to financial determination and the patient's ability to pay for medical services.

Specific Duties:

- 1.) Interviews in/out-patients, family and/or patient representatives located at the hospital or in community clinics, to gather patient information on financial resources for payment of medical services provided.
- 2.) Interprets provisions and requirements of Federal, State and County aid programs, and explains to patients their rights and obligations.
- 3.) Counsels patients regarding their financial ability to reimburse the County for medical care.
- 4.) Assists patients with budget planning as necessary and arranges payment plans and secures payments.
- 5.) Evaluates a variety of deeds, life insurance policies, negotiable securities and miscellaneous collateral to determine their value as security, and obtains real property liens, assignments of insurance policies and third party liability liens.
- 6.) Conducts a financial evaluation of each patient to determine ability to meet financial obligations.
- 7.) Based upon financial evaluation, may refer patient to Eligibility Unit for Medi-Cal determination, and may establish extended payment agreements.
- 8.) Attends training meetings, regulation updating meetings and other meetings to keep abreast, and informs others about changes in rules and regulations.
- 9.) Resolves complex problems involving the interface of various private and governmental resources to assure appropriate billing and maximum reimbursement to the County.

Safety Requirements: All employees are required to observe company safety procedures and standards to insure individual and collective safety, in addition to avoiding unnecessary risk to oneself, co-workers, customers, and property.

Uniform:

1. Not Required.

Equipment:

- | | |
|------------------|-------------------------|
| 1. Computer. | 5. Facsimile machine. |
| 2. Keyboard. | 6. Telephone. |
| 3. Printer | 7. Ten-key. |
| 4. Copy machine. | 8. Card making machine. |

Required Job-Related Knowledge, Education, Ability or Experience:

Knowledge:

1. Interviewing and record keeping principles and techniques.
2. Modern office practices and procedures, including business correspondence.
3. Accounts receivable function.
4. Computerized billing systems.

Desirable:

5. Provisions of the Medi-Cal and Medicare programs health insurance programs, and other pertinent legislation in the field of public medical assistance.
6. Fundamental aspects of human behavior.
7. Various departments and agencies that interface with the financial determination functions, i.e., County Collection Office, Eligibility Unit of the County Welfare Department, and County Hospital departments.
8. The general goals of the Accounts Receivable Division.
9. Medical terminology.
10. Computer literacy.
11. Bilingual in Spanish and English.

Education:

1. One year of eligibility determination or financial counseling or two years of full-time general clerical experience involving bookkeeping, payroll, or other statistical or financial duties. **OR**
2. The equivalent of one-year of full-time journey-level clerical experience involving bookkeeping, payroll or other statistical or financial duties. **AND**
3. One year of relevant college course work and experience in a health care setting.

Ability/Qualifications:

1. Learn, understand, interpret and implement complex regulations of Medi-Cal and third party payor programs, and related reimbursement programs.
2. Record and accurately evaluate data.
3. Analyze and evaluate individual situations in determining ability to pay.
4. Resolve problems in stressful and difficult situations.
5. Prepare clear and concise written reports.
6. Make accurate arithmetic computations.
7. Minimize workload through efficient use of automated and manual procedures.

Experience/Qualifications:

1. Office experience.
2. Public Contact
3. Arithmetic calculations on bookkeeping.
4. Successful completion of a post-offer, pre-placement physical abilities test.

Driver's License:

1. Applicants must possess and maintain a valid California Driver's License and remain free from repeated preventable accidents.

All employees within the Patient Finance Counselor Department are required to provide physical assistance for all weight and frequency requirement needs of all job tasks in order to maintain a safe work environment. Employees must be physically capable of working in any of the job tasks within the Patient Finance Counselor Department..

General Qualifications:

1. Pass County-paid job-related background or reference check.
2. Pass County-paid health screening examination, including drug screening test.
3. Perform job duties in a manner assuring a safe working environment for oneself and others.
4. Establish and maintain effective working relationships with the general public, co-workers, supervisors and members of diverse cultural and linguistic backgrounds regardless of race, color, national origin, ancestry, political affiliation, sex, sexual orientation, religion, marital status, age (over 40), pregnancy related condition, medical condition (cancer related), persons with a physical disability (including AIDS), or mental disability.
5. Maintain confidential information according to legal standards and/or County Regulations as required.

Work Hours:

Monday through Friday
7:30 a.m. to 4:00 p.m.
8:00 a.m. to 4:30 p.m.
8:30 a.m. to 5:00 p.m.
10:30 a.m. to 7:00 p.m.

Saturday through Sunday
9:30 a.m. to 6:00 p.m.

Union:

AFSCME (Optional).

Functional Activities:

The frequency of the following activities may vary according to the physical requirements of the specific job tasks the employee may be required to perform at random intervals.

The following percentages are given in terms of an eight-hour workday:

Seldom	= Less than 1%	Frequent	= 34% - 66%
Occasional	= 1% - 33%	Continuous	= 67% - 100%

1. PUSH: Pushing activities may require use of the back flexors and extensors in conjunction with bicep/tricep musculature.	
	Maximum Requirement
Maximum Force:	10 Pounds
0-10 Pounds:	Seldom
11-25 Pounds:	Not Required
26-35 Pounds:	Not Required
36-50 Pounds:	Not Required
51-75 Pounds:	Not Required
Assistive Devices: None required.	
Comments: Pushing is utilized with activities such as retrieving and/or returning supplies (e.g. miscellaneous office furniture components). The employee exerts up to 10 pounds of force in a horizontal plane from waist to shoulder height of a distance up to 2 feet when performing job tasks (e.g. open/close drawers, files, doors).	

2. PULL: Pulling activities may require use of the back flexors and extensors in conjunction with bicep/tricep musculature.	
	Maximum Requirement
Maximum Force:	10 Pounds
0-10 Pounds:	Seldom
11-25 Pounds:	Not Required
26-35 Pounds:	Not Required
36-50 Pounds:	Not Required
51-75 Pounds:	Not Required
Assistive Devices: None required.	
Comments: Pulling is utilized with activities such as retrieving and/or returning supplies (e.g. miscellaneous office furniture components). The employee exerts up to 10 pounds of force in a horizontal plane from waist to shoulder height of a distance up to 2 feet when performing job tasks (e.g. open/close drawers, files, doors).	

3. STAND-UP LIFT: Lifting from/to floor and waist height level.

	Maximum Requirement
Maximum Force:	0 Pounds
0-10 Pounds:	Not Required
11-25 Pounds:	Not Required
26-35 Pounds:	Not Required
36-50 Pounds:	Not Required
51-75 Pounds:	Not Required
Assistive Devices: None required.	
Comments: A stand-up lift is not required to perform job tasks.	

4. LEVEL LIFT: Lifting weight from waist height level to waist height level for a maximum of four feet.

	Maximum Requirement
Maximum Force:	5 Pounds
0-10 Pounds:	Occasional
11-25 Pounds:	Not Required
26-35 Pounds:	Not Required
36-50 Pounds:	Not Required
51-75 Pounds:	Not Required
Assistive Devices: None required.	
Comments: A level lift is utilized with activities such as retrieving, returning, storing, moving and/or transporting equipment and supplies (e.g. forms, documents, mail, copy paper). The employee lifts items weighing between less than 1 pound and 5 pounds up to 36 inches in height when performing job tasks (e.g. lift phone book; handfuls of documents; files; up to 5-pound ream of copy paper).	

5. WEIGHT CARRY: Carrying weight at waist height level beyond a distance of four feet.

	Maximum Requirement
Maximum Force:	5 Pounds
0-10 Pounds:	Occasional
11-25 Pounds:	Not Required
26-35 Pounds:	Not Required
36-50 Pounds:	Not Required
51-75 Pounds:	Not Required
Assistive Devices: None required.	
Comments: Weight carry is utilized with activities such as retrieving, returning, storing, moving and/or transporting equipment and supplies (e.g. forms, documents, mail, copy paper). The employee carries items weighing between less than 1 pound and 5 pounds between 5 feet and 50 feet when performing job tasks (e.g. carry phone book; handfuls of documents; files; up to 5-pound ream of copy paper).	

6. OVERHEAD LIFT/PULL DOWN	
	Maximum Requirement
Maximum Force:	0 Pounds
0-10 Pounds:	Not Required
11-25 Pounds:	Not Required
26-35 Pounds:	Not Required
36-50 Pounds:	Not Required
51-75 Pounds:	Not Required
Assistive Devices: None required.	
Comments: Overhead lift/pull down is not required to perform job tasks. Variables to overhead reaching will be the employee's height and anthropometric reach.	

7. OVERHEAD REACH	
	Maximum Requirement
Maximum Frequency:	Not Required
Comments: Overhead reach is not required to perform job tasks. Variables to overhead reaching will be the employee's height and anthropometric reach.	

8. FORWARD REACH	
	Maximum Requirement
Maximum Frequency:	Occasional
Comments: Forward reach is performed to a maximum distance of 28 inches when retrieving, returning, storing and/or transporting equipment and supplies (e.g. reach in order to open/close desk/files drawers; utilize office equipment; document reading and research). The degree of elbow extension required for reaching will vary according to the employee's anthropometric reach.	

9. STOOPING	
	Maximum Requirement
Maximum Frequency:	Seldom
Comments: Stooping is performed when retrieving, returning, storing and/or transporting equipment and supplies (e.g. stoop to reach below waist height for filing). Variable to stooping will be the employee's height. Stooping of the head, trunk and knees can be minimized or avoided by substituting alternate positions of squatting, kneeling or bending when performing job tasks.	

10. SQUATTING (Unloaded)	
	Maximum Requirement
Maximum Frequency:	Not Required
Comments: Squatting is not required to perform job tasks. Squatting may be minimized or avoided by substituting alternate positions of bending or kneeling. Partial squatting is a preferred lifting posture.	

11. REPETITIVE BENDING	
	Maximum Requirement
Maximum Frequency:	Occasional
Comments: Bending forward at the waist is performed when retrieving, returning, storing and/or transporting equipment and supplies (e.g. bend to reach below waist height for filing). Maximum forward trunk flexion required is 60 degrees. Employee may avoid excessive forward bending of the trunk up to 80 degrees by using alternate positions of bending at the hips, kneeling, half kneeling, stooping, sitting or squatting.	

12. TWISTING	
	Maximum Requirement
Maximum Frequency:	Occasional
Comments: Twisting at the waist is required to perform job tasks. Twisting at the waist may be minimized by turning the whole body, including the feet and working from a swivel chair.	

13. TURNING	
	Maximum Requirement
Maximum Frequency:	Occasional
Comments: Turning is performed when retrieving, returning, storing, adjusting and/or transporting equipment and supplies (e.g. turn when filing, interviewing customers; copying).	

14. KNEELING	
	Maximum Requirement
Maximum Frequency:	Not Required
Comments: Kneeling is not required to perform job tasks. Kneeling may be minimized or avoided by substituting alternate positions of bending, squatting, or half kneeling.	

15. CRAWL	
	Maximum Requirement
Maximum Frequency:	Not Required
Comments: Crawling is not required to perform job tasks.	

16. STAIR CLIMB	
	Maximum Requirement
Maximum Frequency:	Not Required
Comments: Stair climb is not required in order to go to/from the work sites. Elevators or ramps are available.	

17. LADDER CLIMB	
	Maximum Requirement
Maximum Frequency:	Not Required
Comments: Ladder climbing is not required to perform job tasks. Variables to overhead climbing will vary according to the employee's height and anthropometric reach.	

18. WALKING	
	Maximum Requirement
Maximum Frequency:	Occasional
Comments: Walking is performed when retrieving, returning, storing, moving and/or transporting equipment and supplies (e.g. walk to/from work sites, copier, customer interview, business office, collaborating agencies, urgent care). Walking length varies between 3 feet and 200 feet depending on job task.	

19. SITTING	
	Maximum Requirement
Maximum Frequency:	Frequent
Comments: Sitting is performed for a maximum of 30 minute intervals when performing work duties (e.g. interviewing customers; keyboard; handwriting; reading and research; telephone). Sitting may be minimized by substituting an alternative position of standing during customer interview or telephone conversation.	

20. STANDING (Static)	
	Maximum Requirement
Maximum Frequency:	Seldom
Comments: Static standing is performed for a maximum of 10 minute intervals when operating equipment (e.g. stand to copy; interview customers).	

21. BALANCE	
Maximum Frequency: Occasional	
Comments: Good balance is required for safe walking, climbing and lifting.	

22. OPERATING HAND/FOOT CONTROLS	
	Maximum Requirement
HAND:	
Right:	Seldom
Left:	Seldom
Both:	Seldom
Either:	Not Required
FOOT:	
Right:	Seldom
Left:	Seldom
Both:	Not Required
Either:	Not Required
Comments: Hand controls are utilized to operate equipment (e.g. driving vehicle) when traveling to/from work sites (e.g. driving vehicle). Foot controls are utilized to operate equipment (e.g. driving vehicle).	

23. UPPER AND LOWER EXTREMITY COORDINATION	
	Maximum Requirement
Simple Grasping:	Frequent
Firm Grasping:	Seldom
Fine Manipulation:	Frequent
Eye/Hand Coordination:	Frequent
Hand/Foot Coordination:	Seldom
<p>Comments: Grasping and coordination activities are performed when retrieving, returning, storing, adjusting, moving and/or transporting equipment and supplies (e.g. miscellaneous office desk equipment). Simple grasping is utilized to perform job tasks (e.g. lifting objects weighing less than 5 pounds; page turning; filing; telephone; open/close doors; document research). Firm grasping is utilized to perform job tasks (e.g. lifting objects weighing 5 pounds or greater). Fine manipulation is utilized to perform job tasks (e.g. keyboard, handwriting, telephone key pad, filing, page turning, 10-key). Eye/hand coordination is utilized to perform job tasks (e.g. keyboard, handwriting, telephone key pad, filing, page turning, 10-key). Hand/foot coordination is utilized to perform job tasks (e.g. driving vehicle). Depending on individual hand dominance, one hand may be used more frequently than the other when performing job tasks.</p>	

24. CERVICAL RANGE OF MOTION	
	Maximum Requirement
Static neutral position:	Frequent
Flexing:	Occasional
Rotating:	Occasional
Extending:	Not Required
<p>Comments: Neck movement is required when performing job tasks (e.g. interviewing customers, data entry, handwriting, reading and research). Participating in observation of work environment allowing for safe working conditions. Full cervical range of motion is required to safely perform the job tasks.</p>	

END OF REPORT

MEMORANDUM OF UNDERSTANDING

Enclosed are the results of the Essential Functions Job Task Analysis that were obtained for the position of **Patient Finance Counselor**.

Please note the specific maximum weight and frequency requirements of the definitions as follows:

STANISLAUS COUNTY

<i>Job Task Analysis Summary</i>	
Patient Finance Counselor	
<i>Functional Activities</i>	<i>Maximum Requirements</i>
<i>Push</i>	10 pounds {Seldom}
<i>Pull</i>	10 pounds {Seldom}
<i>Stand Up Lift</i>	0 pounds {Not Required}
<i>Level Lift</i>	5 pounds {Occasional}
<i>Weight Carry</i>	5 pounds {Occasional}
<i>Overhead Lift/Pull Down</i>	0 pounds {Not Required}
<i>Overhead Reach</i>	Not Required
<i>Forward Reach</i>	Occasional
<i>Stooping</i>	Seldom
<i>Squatting (Unloaded)</i>	Not Required
<i>Repetitive Bending</i>	Occasional
<i>Twisting</i>	Occasional
<i>Turning</i>	Occasional
<i>Kneeling</i>	Not Required
<i>Crawl</i>	Not Required
<i>Stair Climb</i>	Not Required

<i>Job Task Analysis Summary (Continued)</i>	
Patient Finance Counselor	
<i>Functional Activities</i>	<i>Maximum Requirements</i>
<i>Ladder Climb</i>	Not Required
<i>Walking</i>	Occasional
<i>Sitting</i>	Frequent
<i>Standing (Static)</i>	Seldom
<i>Balance</i>	Occasional
<i>Operation of Hand Controls</i>	Seldom
<i>Operation of Foot Controls</i>	Seldom
<i>Hand Grasping</i>	Frequent
<i>Finger Manipulation</i>	Frequent
<i>Cervical Range of Motion</i>	Frequent

It is agreed that this document is accurate and correct.

_____ Date: _____
 Lyle Andersen, PT
 Preparer Signature

_____ Date: _____
 Contact Person
 Title

_____ Date: _____
 Contact Person
 Title

_____ Date: _____
 Contact Person
 Title

LA/jr

**Andersen & Baim Physical Therapy
Pre-Work Screening Test Validation.**

Category I

Jot Task Analysis (JTA): Physical and functional demands for this job task analysis were documented by Andersen & Baim Physical Therapy, Inc. The methodology for documentation consists of on-site visits, using various measuring devices such as dynamometers and scales, as well as observation and interviews with employees and managers. A detailed record was made of the physical and functional demands of the job in terms of force pounds, weight, frequency, height, distance, anthropometric measurements, stamina and degrees range of motion. The determination of the frequencies of functional activities are based on standards provided by the National Institute of Occupational Safety and Health (NIOSH) and the work practice guide for manual lifting (US Department of Commerce, National Technical Information Service).

Category II

Critical Demands of the Job are:

- A.
- B.
- C.

Category III

Compatibility: An actual employee participated in the Pre-Work Screening Test and agreed that the testing and critical demands of the job adequately and appropriately matched the physical requirements of the job. Employee approval statement follows:

I, _____, am currently a full-time employee for _____ performing the job title of _____. I am in complete agreement that the Pre-Work Screening Test that I participated in adequately portrays and simulates my actual job and was compatible with the maximum physical requirements that are utilized to safely perform my job as documented in the JTA.

Employee Participant Signature: _____

Date: _____

Employer Representative Name: _____

Date: _____

Category IV

Test Examiner Standardization: Examiners performing the Pre-Work Screening Test are in compliance with competency standards established by the testing center of Andersen & Baim Physical Therapy, Inc. Criteria for an examiner include:

- A. On-Site training with an Andersen & Baim physical therapy certified examiner.
- B. Quarterly on-site competency testing.
- C. Video/audio documentation of all certified examiners performing the test according to the standardized procedures found in the procedure manual.