

POSITION DESCRIPTION (Please Read Instructions on the Back)

1. Agency Position No.
4444-A

2. Reason for Submission <input type="checkbox"/> Redescription <input checked="" type="checkbox"/> New <input type="checkbox"/> Reestablishment <input type="checkbox"/> Other		3. Service <input type="checkbox"/> Hdqtrs <input checked="" type="checkbox"/> Field		4. Employing Office Location Palo Alto, CA		5. Duty Station Palo Alto		6. OPM Certification No.	
7. Fair Labor Standards Act <input type="checkbox"/> Exempt <input checked="" type="checkbox"/> Nonexempt		8. Financial Statements Required <input type="checkbox"/> Executive Personnel Financial Disclosure <input type="checkbox"/> Employment and Financial Interests		9. Subject to IA Action <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		10. Position Status <input checked="" type="checkbox"/> Competitive <input type="checkbox"/> Excepted (Specify in _____) <input type="checkbox"/> SES (Gen.) <input type="checkbox"/> SES (CR)		11. Position is: <input type="checkbox"/> Supervisory <input type="checkbox"/> Managerial <input checked="" type="checkbox"/> Neither	
12. Sensitivity <input checked="" type="checkbox"/> 1-Non-Sensitive <input type="checkbox"/> 3-Critical Sensitive <input type="checkbox"/> 2-Noncritical Sensitive <input type="checkbox"/> 4-Special Sensitive		13. Competitive Level Code T01		14. Agency Use Bus Cd: 0065		15. Classified/Graded by		Official Title of Position	

15. Classified/Graded by	Official Title of Position	Pay Plan	Occupational	Gra	Initial	Date
a. U.S. Office of Personnel Management						
b. Department, Agency or Establishment						
c. Second Level Review						
d. First Level Review	Claims Assistant (OA)	GS	998	6		09/13/06
e. Recommended by Supervisor or Initiating Office						

16. Organization Title of Position (If different from the official title)		17. Name of Employee (if vacant, specify)	
18. Department, Agency, or Establishment VA Palo Alto Health Care System		c. Third Subdivision	
a. First Subdivision Ambulatory Care Service		d. Fourth Subdivision	
b. Second Subdivision Comp & Pen Section		e. Fifth Subdivision	

Employee Review — This is an accurate description of the major duties and responsibilities of my position. Signature of Employee (optional)

20. **Supervisory Certification.** I certify that this is an accurate statement of the major duties and responsibilities of this position and its organizational relationships, and that the position is necessary to carry out Government functions for which I am responsible. This certification is made with the knowledge that this information is to be used for statutory purposes relating to appointment and payment of public funds, and that false or misleading statements may constitute violations of such statutes or their implementing regulations.

a. Type Name and Title of Immediate Supervisor Sharon Shupe, Supervisor, C&P		b. Typed Name and Title of Higher-Level Supervisor or Manager (optional) Judith Thielen, Asst Chief, Ambulatory Care (11C)	
Signature	Date	Signature	Date
		Judith Thielen	9-12-06

21. **Classification/Job Grading Certification.** I certify that this position has been classified/graded as required by Title 5, U.S. Code in conformance with standards published by the U.S. Office of Personnel Management or, if no published standards apply directly, consistently with the most applicable published standards.

22. Position Classification Standards Used in Classifying/Grading Position
GS-998, dtd 08/01 + GEG for Office Automation, dtd 11/90.

Typed Name and Title of Official Taking Action Carol Phillips, Classification Specialist		Information for Employees. The standards, and information on their application, are available in the personnel office. The classification of the position may be and corrected by the agency or the U.S. Office of Personnel Management. Information on classification/job grading appeals, and complaints on exemption from FLSA, is available from the personnel office or the U.S. Office of Personnel Management.	
Signature	Date		
Carol Phillips	09/13/06		

23. Position Review	Initials	Date	Initials	Date	Initials	Date	Initial	Date	Initial	Date
a. Employee (optional)										
b. Supervisor										
c. Classifier										

24. Remarks
3/30/10 (cs) – See Scheduling Duties Addendum attached.

25. Description of Major Duties and Responsibilities (See Attached)

CLAIMS ASSISTANT (OA), GS-998-6
COMPENSATION AND PENSION/ENVIRONMENTAL EXAMS UNIT

I. MAJOR DUTIES AND RESPONSIBILITIES:

A. As Claims Assistant, the incumbent is responsible for the daily administrative operations of the Specialized Examination Unit at the Veterans Affairs Palo Alto Health Care System. The successful operation of this program (meeting the Veterans Benefits Administration-established processing time of 35 days and remand rate of 2% or less) is one element in the Health Care System Director's performance evaluation; it also directly affects the awarding of benefits to veterans, so high priority attention is given to all aspects of the program.

The core unit for this program is located at the Palo Alto Division. This unit is staffed by three Claims Assistants and a Supervisor assigned to Ambulatory Care Service, and is generally open Monday through Friday, 8:00am to 4:30pm. The staff in this unit initiate and carry out a variety of advisory and technical duties, including receiving, scheduling requests and releasing completed examinations for Compensation and Pension (C&P), Agent Orange, Persian Gulf Environmental Exposure, Ionizing Radiation and former Prisoner of War (POW).

This includes ordering lab, x-ray and other tests necessary for the examinations, serving as clinic receptionist, providing information to veterans on the specialized examination process, routing veterans to various destinations, providing administrative support for clinical staff who perform the specialized exams, and communicating with VBA staff at VA Regional Office in Oakland or Environmental staff at VA Central Office.

The staff in the core unit works closely with clerical staff in medical, surgical and psychiatric clinics at all divisions of this health care system where specialized exams may be performed. The incumbent is considered the authority on administrative issues and keeps other staff informed of regulations, policies and procedures regarding compensation & pension and environmental exam eligibility and benefits, clinic management, medical record management and customer service.

The work in the unit is divided into two phases: phase I is the receiving/scheduling part of the process and phase II is the clinic preparation/completion part of the process. Even though the incumbent may focus on one phase or the other during a particular period of time, he/she is expected to be competent in both phases of the operation. Cross-coverage is provided within the unit staff during absences for annual or sick leave.

B. Provides Administrative Support: The incumbent ensures that all clinic administrative requirements meet established standards and are completed accurately and within allotted timeframes for each step in the examination

process. Independently performs a variety of miscellaneous involved or complicated duties in support of the program. Administrative requirements for the two programs (C&P and Environmental) are very different, so the incumbent may have to shift processes as he/she moves between operations of the different programs. The position is further complicated in that the incumbent must operate as a team member of a self-directed work team to accomplish the program-mandated goals within the set timeframe. The incumbent must have the ability to function in any of the various duties required from receipt to release of these critical and specialized examinations. These assignments are complex in nature, requiring attention to detail, coordination with team members, supervisor, administrative and clinical staff throughout both the examination unit and the HCS.

C. Management of Program Activities:

For C&P examinations:

The Claims Assistant receives all requests (2507s) initiated from VA Regional Office for C&P examinations, prepares the requests for initial review/orders by the clinician, schedules all appointments into the decentralized hospital computer program (DHCP) and notifies the veterans either by telephone or mail of the appointment(s). He/she assures that the veteran is given appropriate instructions for reaching the exam site and for completing any testing that may be required. When scheduling, the incumbent constantly checks clinic availability for all of the C&P providers to assure the earliest available appointment is scheduled. He/she advises supervisory staff of scheduling problems. Ensures proper sequencing of multiple appointments to avoid complications. Enters requests for lab, x-ray and other tests into VistA/CPRS at the clinician's request and direction.

The incumbent prepares paperwork for each clinic, assures that the exam worksheets, health summary and encounter forms are included, and assures delivery prior to and pick-up after the clinic is completed. The incumbent monitors the completion of all examinations and secures results for review in a timely manner.

For Environmental examinations:

The incumbent receives and processes consults from local clinicians, and/or direct requests from patients or other administrative staff for the scheduling of the environmental registry examinations. Must review the period of service to determine eligibility; must contact the veteran to schedule; must determine if lab/x-rays are necessary and place orders for such when needed; must advise on the registry process; must assure the questionnaire is completed by the veteran; must assure the physician examiner completes all requirements, including the follow-up letter after the examination; and finally must enter the electronic code sheet information that is relayed to the registry center in VA Central Office.

For both programs, the incumbent informs the Supervisor of all problems or potential problems when they are first noted. He/she works with the supervisor to correct problems.

D. Receives/Directs/Processes Patients: The incumbent serves as clinic assistant for the Environmental Clinic and for many of the C&P clinics held at Palo Alto Division. He/she checks patients in and out, and is responsible for collecting, compiling and entering all required data at the time of check-out, all of which must be accurate. Is responsible for identifying the need, then completing all registration and Means Test updates. When the data is not accurate, it may have an adverse impact on both the veteran and the health care system. This can result in loss of benefits, funding and/or an unfavorable image of the HCS.

E. Communication/Customer Service: The incumbent has good knowledge of, and is able to advise the veteran of, the C&P process (e.g.: how to file a claim, what to expect of the process, possible timelines, etc.) and the Environmental examination process.

The incumbent responds to questions from veterans and staff concerning services, responds to complex questions involving a range of issues, provides advice regarding regulations, researches problems and/or reviews issues and requests related information as needed regarding provision of services and eligibility. He/she advises veterans on benefits of a routine nature and refers to Benefits Counselors for information of a complex nature. Schedules, cancels, reschedules as necessary and shows sensitivity to special situations and problems. Responds to unclear inquiries from patients concerning a variety of medical, personnel and administrative matters, determines the general nature of the inquiry and independently responds to all administrative questions. Recognizes and refers urgent medical inquiries to professional staff for immediate action. Coordinates requests for release of information, acts as liaison between our facility and patients for consulting, advising and assisting on information concerning benefits.

F. Medical Record Management/Information Security: The incumbent receives, logs Claims Files (C-Files) as they arrive from Regional Office, delivers to the clinics for each appointment, picks up after the appointment and returns to Regional Office. Keeps track of each C-File and assures that all are accounted for at all times. Assures that all C-Files are returned to VARO in a timely manner. Is responsible for completion and maintenance of the electronic registry examination code sheets for all environmental examinations; for scanning of military discharge papers when not already in VAPAHCS electronic system; for assuring appropriate eligibility coding of all who have environmental exposure.

In the performance of all of the above duties, the incumbent has regular access to printed and electronic files containing sensitive data, which must be protected under the provisions of the Privacy Act of 1974, and other applicable laws, federal regulations, VA statutes and policies. The incumbent is responsible for protecting this data from unauthorized release or from loss, alteration or unauthorized deletion and for following applicable regulations and instructions regarding access to computerized files.

II. FACTORS:

A. KNOWLEDGE REQUIRED BY THE POSITION:

1. A thorough working knowledge of the VistA scheduling package and the operation and standard operating procedures for the medical/surgical and psychiatric clinics.
2. A good working knowledge of medical terminology in order to be familiar with information provided on exam requests, to assure the appropriate tests are ordered, to be able to interpret orders and to appropriately schedule exams/tests.
3. Familiarity and understanding of the importance of the Privacy Act and the Freedom of Information Act in order to properly protect medical information available from computer terminals, printouts, medical records, C-Files and other clinical documents.
4. Knowledge of an extensive body of regulations and local policies regarding entitlement to care, outpatient programs, ancillary services, the Compensation & Pension process and the Environments examination process in order to advise veterans, staff, family members, and others when questions or problems are encountered. This knowledge is also utilized when providing recommendations to the clinical staff that, in turn, are able to answer questions and determine appropriate evaluation/treatment based on this information. Extended training and experience is required to perform a wide variety of interrelated and nonstandard procedural assignments and to resolve a wide range of problems.
5. Familiarity with the clinic locations, meeting times of all Environmental and C&P clinics as well as of other specialty clinics and support services that occasionally perform C&P exams.
6. Good communication skills and the ability to interact with veterans and staff in a positive, friendly, helpful, supportive and professional manner. Ability to cope successfully with individuals who may be in the various stages of psychosis, alcoholism, major or minor physical or mental ailments and/or disabilities, or those who are belligerent or unreasonable. Communication both verbal and in writing is necessary.
7. Ability to understand and utilize VistA/CPRS, PCs, printers and other office automation equipment, as well as the ability to utilize various options/menus, and a technical understanding to determine when specialized support is required when equipment does not function.
8. Must be a qualified typist (type 40 w.p.m.) in order to type letters, forms and to enter/retrieve data in VistA/CPRS.

9. Knowledge of time management techniques in order to assess priorities in workload, telephone calls and general office activity so that work is accomplished accurately, efficiently and in order of importance.

10. Knowledge of Business Office procedures as they relate to update of registrations, Means Tests, assignment of eligibility category, eligibility for additional care/services. The incumbent must possess extensive knowledge of eligibility entitlement for specialized examinations and/or medical treatment of veterans.

11. Extensive knowledge of beneficiary travel regulations in regards to eligibility for travel reimbursement.

B. SUPERVISORY CONTROLS: The Supervisor of the C&P Program provides general day to day supervision, guidance, training, and instruction concerning new procedures and/or changes in existing policies/procedures. The incumbent must work independently throughout much of the day using guidelines he/she has been trained to follow. Uses initiative in carrying out recurring assignments independently without specific instruction but refers to the Supervisor for guidance when emergent, unusual or complex situations occur. The Supervisor assures that finished work and methods used are technically accurate and in compliance with instructions or established procedures. Review of the work increases with more difficult assignments if the incumbent has not previously performed similar assignments.

C. GUIDELINES: Guidelines are available but are not completely applicable to the work, or have gaps in specificity. Guidelines consist of VA manuals, pertinent laws, regulations, VA Central Office and VAPAHCS Directives, Standard Operating Procedures and other instructions issued by the Supervisor or Ambulatory Care Administrative staff. The C&P Assistant must exercise good judgment in interpretation so that the intent of the law and regulations are complied with in the C&P setting. Independent judgment is required in dealing with day-to-day problems involving individual patients. The incumbent analyzes results and recommended changes.

D. COMPLEXITY: Work is performed partly in a fairly quiet office environment and partly in a variety of busy clinic locations where conditions may be very stressful. The incumbent must be able to cope with a variety of personalities, heavy workloads, and frequent personal and telephone contacts, all of which require strict attention to detail and independent resolution of day-to-day responsibilities and problems. The work includes various duties involving different and unrelated processes and methods. The decision regarding what needs to be done depends upon the analysis of the subject, phase, or issues involved in each assignment, and the chosen course of action may have to be selected from many alternatives. The work involves conditions and elements that must be identified and analyzed to discern interrelationships.

Good organizational skills are essential in order to complete all requirements of

each day and decide priorities of workload, which include prep time, telephone calls, patient activity (scheduling, check-in, check-out) and other immediate demands of patients and staff. The demands of this busy program include numerous interruptions in the process of keeping up with the daily routine. The numerous office/clinic activities, the strict timeline requirements of the C&P process and the constraints of the medical environment combine to create a diverse, responsible and complex job.

E. SCOPE AND EFFECT:

1. The purpose of this assignment is to receive C&P exam requests, schedule appointments, coordinate the exam process and return the completed exams to VA Regional Office. The work performed has a direct bearing on the veteran's award/receipt of disability benefits, on the public's attitude toward the Department of Veterans' Affairs and our local Health Care System and on the performance rating of our Health Care System Director. With our current healthcare environment and emphasis on customer service, it is essential that frontline clerical staff present a positive image of our Health Care System and provide timely, customer-friendly service at all times.

2. In assuring that patients are registered properly (scheduled as the correct "appointment type", checked in, checked out with all required data), the C&P clerk plays a pivotal role in the accurate recording of the HCS's workload. Errors in this process can lead to a reduction in funding to our HCS, and in turn, a reduction of services provided to the veteran population.

F. PERSONAL CONTACTS: Contacts are personal, written or telephonic with veterans, their families, clinical and administrative staff in our Health Care System, other VA Medical Centers, and VA Regional Office in Oakland, contractors, veterans' service officers and VBA staff in VA Central Office. Contacts may be formal or informal, occur in conferences or meetings, scheduled or unplanned, face-to-face, in writing or by telephone.

G. PURPOSE OF CONTACTS: Contacts described above are to gather or communicate facts and information (which may range from easily understood to highly technical); to resolve differences of opinions; to interview and process requests for C&P disability exams; to receive training, advice and guidance from supervisory staff; to expedite the problem-solving of complaints/problems and to accomplish the day-to-day responsibilities of the position.

H. PHYSICAL DEMANDS: The duties and responsibilities of this position require some mobility between the C&P office and various other clinics/offices located at any of our eight Health Care System sites, but generally the job is sedentary with some standing, stooping, reaching and lifting up to 20 pounds. The position is far more demanding mentally than physically. It requires some emotional strength to work with a program that receives constant top management attention and must adhere to strict established timelines and to work with veterans and their families with complex debilitating illnesses that have

monetary gain or loss at issue.

I. WORK ENVIRONMENT: The work is performed primarily in an office/outpatient clinic environment within our Health Care System. The incumbent could be exposed to communicable diseases and other risks associated with working in a healthcare setting where there are patients with a wide variety of medical, surgical and psychiatric problems. The work area is adequately lighted, heated and ventilated.

Scheduling Duties:

The incumbent schedules outpatient clinic appointments using Veterans Health Information Systems and Technology Architecture (VistA) scheduling options. The incumbent follows nationally established business rules to schedule appointments for veterans. This includes clinic visits, consultations and entries into the Electronic Wait List (EWL). The incumbent completes the mandatory national and local training requirements for the outpatient scheduling process.