

Jurisdictional Class: Competitive; Non-Competitive in County  
Adopted: October 25, 1989  
Revised: June 11, 2010

**PATIENT AGENT**

**DISTINGUISHING FEATURES OF THE CLASS:** This is routine work involving responsibility for assisting patients/residents with daily functions including but not limited to scheduling of appointments, arranging transportation, and completion of paperwork. Work is performed under general supervision with leeway allowed for the exercise of independent judgment in carrying out assigned duties in accordance with established policies and procedures. The incumbent does related work as required.

**TYPICAL WORK ACTIVITIES:** (Illustrative only)

- Schedules appointments for patients/residents as requested or upon administrative or physician's orders, and posts notices for residents and families as indicated;
- Transports residents/patients to appointments or engagements in a safe and timely manner and tracks statistics for audits;
- Coordinates the scheduling and use of facility vehicles to ensure availability of transportation as required;
- Coordinates transport of paperwork, information, specimens, etc. to local offices, hospitals, laboratories, colleges, etc;
- May assist patients/residents in personal shopping and may occasionally be required to purchase small supplies for the facility;
- Assists in obtaining endorsements on checks and other necessary financial documents, receives payments from families and/or patients/residents for care, and issues receipts, prepares transmittal for processing with the Treasurer's Office, and answers questions regarding financial concerns for families and/or patients/residents;
- Provides assistance with paperwork for items such as Medicaid, Veterans Administration, and Social Security Certification and recertification in conjunction with the Nursing Home Social Worker and appropriate caseworker;
- Assists patients/residents in establishing (opening and closing) savings accounts, facilitates requests for spending money, and provides patients/residents and families with quarterly bank statements or reports requested;
- Advertises meeting dates for resident Council Meetings and assists in meeting preparations, taking minutes of meetings, and in follow up of points of concern under the direction of the Nursing Home Social Worker;
- Visits residents at their request;
- Completes reports and maintains records as required;
- Assists with preparation and formulation of special events and programs;
- Codes/files medical records and required reports (Alzheimers) in conjunction with Nursing Department;
- Updates and maintains facility waiting list;
- Coordinates notification of residents/families re: care planning conference;
- Prepares required applicant paperwork for potential admission to facility;
- Assists Social Worker with office procedures including but not limited to completion of forms, scheduling, and filing;
- Meets with applicants, referrals, families, and staff in the absence of the social worker.

Patient Agent

**FULL PERFORMANCE KNOWLEDGE, SKILLS, ABILITIES & PERSONAL CHARACTERISTICS:**

Ability to understand and carry out non-technical oral and written directions;

Ability to treat the ill and aged with tact, understanding, compassion and firmness;

Ability to get along well with others and gain the cooperation of the patient/ resident;

Clerical aptitude.

**MINIMUM QUALIFICATIONS:** Graduation from high school or possession of a high school equivalency diploma.

**SPECIAL REQUIREMENT:** Possession of an appropriate New York State Driver's License at time of appointment.