Title: Patient Advocate Policy

Applies to: Lakeside Family Physicians and Lakeside Primary Care

Number: PPC 1.A.12

Providers recognize that patients are often non-compliant with plans for care because of barriers, social and economic, preventing access to medically necessary services, diagnostic studies, or medications.

I. SCOPE/PURPOSE

Lakeside Family Physicians and Lakeside Primary Care recognizes that patients are often non-compliant with plans for care because of barriers, social and/or economic, that prevent access to medically necessary services, diagnostic studies, supplies or medications. The providers strive to enhance patient care by supporting a full-service patient advocacy program. The patient advocacy program offers another resource to physicians and their patients in the effort to provide a global approach in the treatment of the whole patient.

II. POLICY

Any member of the healthcare team who identifies an economic or social barrier, which may impede the treatment plan of a patient, is empowered to initiate a referral to the staff Patient Advocate Representative (P.A.R.). To promote continuity of care, a copy of the referral will be routed to physician for review. This review ensures the provider is apprised of all efforts involved in patient care as well as creates a conduit for communication to relay any other pertinent information. Upon receipt of the referral, Patient Advocate Representative will engage patient and/or designated caregiver. Advocate will route appropriate documentation to physician summarizing resolution.

III. QUALIFIED PERSONNEL

Members of the healthcare team within the scope of their practice.
IV. PROCEDURE

Financial barriers to medically necessary services, diagnostic studies, supplies or medications:

a. **See Financial Assistance Program Policy-Initiated by physician.** Member of billing office staff responsible for processing the financial assistance program application is notified via code documented on encounter form by doctor. Staff mails application with instructions and contact information for patient advocate to patient/designated caregiver.

b. **Pharmaceutical needs may require a referral to the Patient Advocate Representative for application to Pharmaceutical companies or other appropriate community resources based on financial need.**

Social barriers to medically necessary services, diagnostic studies, supplies or medications:

a. A referral will be generated to engage the Patient Advocate Representative

b. P.A.R will engage patient and/or designated caregiver to clarify or understand barrier. Then, P.A.R. will contact and engage the appropriate resources available based on the patients needs or barriers. Local resources may include, but are not limited to, the medical group, hospital system, lab vendors, social services, senior programs, ministries and various other community programs.

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**SUBMITTED BY:** Nancy Jane Brandt, PCMH Committee

**APPROVED BY:** Policy Committee, Lead Physicians
Dr. David Cook, Medical Director

**INITIAL EFFECTIVE DATE:** May 8, 2006

**DATE REVISED:** September 3, 2009
Job Description

Job Title: Patient Advocate Representative (PAR)
Department: Lakeside Family Physicians
Classification: Hourly

Job Summary
The employee's of Lakeside Family Physicians' Number One Job responsibility is to deliver the most remarkable patient experience, in every dimension, every time, and understand how he or she contributes to the health system's vision of achieving that commitment to patients and families.

The Patient Advocate Representative (PAR) is responsible for identifying resources for patients, family members, and/or caregivers who are experiencing financial, social or other barriers interfering with compliance with a personalized plan of care. The PAR is responsible for coordinating services with internal and external sources to ensure the global needs of these patients are being met. The PAR is a participant in a multidisciplinary team geared to promoting patient outcomes.

Job Relationships
A. Responsible to: Director of Operations
B. Assignments received from: Physicians, Healthcare Team Members
C. Positions supervised: None

Core Processes and Activities
Following is a summary of the major job processes of this job. Other duties may be performed, both major and minor, which are not mentioned below. Specific activities may change from time to time:

A. Conducts and communicates patient needs.
   - Reviews documented medical and social data.
   - Consults with physicians and other members of the health care team.
   - Interviews patient / family / significant other.
   - Documents findings on referral in patient’s medical record.

B. Collaborates with health care team on plan of care.
   - Identifies social, financial and/or other needs.
   - Develops goals with patient / family / significant other.

C. Provides support appropriate to patients’ age, diagnosis, disability and cultural norms.
   - Provides information to patient/family about available services and resources.
• Acts as a liaison to pharmaceutical companies, Federal, State and Local agencies, skilled nursing facilities, assisted living facilities, and insurance companies on behalf of the patient, family, caregivers and primary care physician (PCP).
• Provides support in complex cases.
• Provides consultation to health care team on issues relating to the patient’s plan of care.

D. Participates in evaluation of patient outcomes.
• Takes part in follow-up contact to determine patient outcome.
• Identifies trends and opportunities for improvement.

E. Provides support to patients/families concerning impact of illness/disability and/or change in lifestyle.
• Provides services appropriate to patients’ age, diagnosis, disability and cultural norms.
• Conducts patient and/or family problem assessments.
• Provides patients/families information concerning end-of-life issues.
• Identifies and arranges for community services and resources.

F. Participates as a team member.
• Participates in promoting compliance with the patients’ individualized plan of care.
• Collaborates with physicians on their respective patients.
• Works with a multidisciplinary team and to identify changes that decrease costs and improve efficiency / patient outcomes.
• Participates in education of staff on barriers to healthcare.
• Serves as a liaison to community / state / national agencies.

G. Displays personal commitment to quality.
• Shows respect and consideration for all customers, directing customers to appropriate resources and follows up to ensure customers' needs are met.
• Maintains patient confidentiality and privacy.
• Supports co-workers by offering assistance and encouragement.
• Maintains a positive attitude and strives to create an atmosphere in which all employees can enjoy working. Refrains from making negative comments, but brings concerns to the appropriate person and works to manage issues positively.
• Takes responsibility for department meeting goals related to customer service, staff satisfaction, physician satisfaction, quality outcomes, and financial vitality.

H. Displays leadership, accountability, serving as a coach and role model.
• Communicates in an open, honest manner.
• Shares knowledge and skills with colleagues and others.
• Gives peers constructive feedback regarding their practice.
• Recognizes, respects and shows trust in colleagues and their contributions.
• Identifies conflict, determines accountability for own roles and seeks to manage conflict.
• Remains objective and empathetic despite personal feelings.
• Uses critical thinking skills to obtain best possible outcomes.
• Bases decisions on facts, knowledge and standards.
• Supports team, system and organizational goals.
• Returns calls, emails and instant messages promptly.
I. Displays personal accountability and responsibility for professional growth and development.
   • Completes assigned tasks in a timely manner (i.e. willing to flex schedule if needed to accomplish objective).
   • Incorporates into daily work new practice standards, policy and procedure changes, change identified by clinical improvement outcomes and feedback from case manager.
   • Keeps appropriate persons informed if problems arise which prevent timely completion of work or if variances to procedure occur.
   • Complies with established department guidelines and policies.
   • Maintains knowledge and awareness of clinical practice, issues, trends and technology.