

# New York State Department of Civil Service

## DIVISION OF CLASSIFICATION & COMPENSATION

### Classification Standard

**Occ. Code 6662201**

<b>Resources &amp; Reimbursement Agent 1, Grade 18</b>	<b>6662201</b>
<b>Resources &amp; Reimbursement Agent 2, Grade 20</b>	<b>6662202</b>
<b>Resources &amp; Reimbursement Agent 3, Grade 23</b>	<b>6662203</b>
<b>Resources &amp; Reimbursement Agent 4, Grade 27</b>	<b>6662204</b>

### Brief Description of Class Series

Resources & Reimbursement Agents conduct financial reviews and evaluations, determine payment sources, and develop and submit claims for health care and treatment costs for individuals\* in State facilities and programs. Incumbents also maintain the financial assets and benefits of individuals receiving services.

Positions are classified in the Office of Mental Health, Office for People With Developmental Disabilities, Office of Addiction Services and Supports, and Office of Children and Family Services.

\*Individual refers to a person who is being treated or cared for, and is used in place of patient, client, or other nomenclature specific to an agency.

### Distinguishing Characteristics

*Resources & Reimbursement Agent 1:* full performance level; under the direction of a higher-level Resources & Reimbursement Agent, obtains, reviews, and documents individuals' financial resources; determines eligibility for benefits and applies for services on behalf of individuals; establishes a schedule of charges using predetermined rates; and protects individuals' financial resources and interests.

*Resources & Reimbursement Agent 2:* advanced performance level and/or supervisory level; under the direction of a Resources & Reimbursement Agent 3, handles the more difficult cases with potential legal implications or without clear precedents; assists in the management of a field or facility-based reimbursement office; and may supervise Resources & Reimbursement Agents 1 and/or support staff.

*Resources & Reimbursement Agent 3:* supervisory level; oversees the operations of a field or facility-based reimbursement office; reviews cases involving appeals from determinations, large estates, and potential fraud or mismanagement of individuals' assets; acts as liaison with external federal and State entities; and supervises Resources & Reimbursement Agents 1 and 2.

*Resources & Reimbursement Agent 4:* managerial level; manages administrative or system units dealing with revenue in Central Office or a district and its decentralized field offices; assists in implementing major administrative, policy, and/or systems; and supervises lower-level Resources & Reimbursement Agents.

### Related Classes

Resources & Reimbursement Program Development Specialists assist in the development, evaluation, and maintenance of statewide revenue and reimbursement programs and systems; research and analyze new or proposed federal and State laws, rules, and regulations to determine the impact on agency programs and initiatives; develop, revise, and update policy, procedure, and process guidance materials; provide technical assistance to field agents and provider agencies; and monitor program operations to improve fiscal resources, maximize revenue, and ensure compliance with applicable laws, rules, and regulations.

### Illustrative Duties

#### *Resources & Reimbursement Agent 1*

Obtains information and reviews individuals' financial resources, identifies payment sources for services, determines individuals' eligibility for benefits and assistance programs, and submits claims for health care and treatment costs.

- Interviews individuals, their families, and other relevant parties and obtains financial and insurance documentation.
- Provides financial and policy guidance and training to individuals, families, advocates, not-for-profits, and fiduciaries.
- Submits applications, enrollments, and claims; and maintains individuals' eligibility for Social Security, Supplemental Security Income, Veteran's Benefits, Supplemental Nutrition Assistance Program, pensions, Medicare, Medicaid, and other forms of benefits and/or health insurance coverage.
- Establishes a schedule of charges for individual's using predetermined rates to obtain reimbursement for services provided.
- Monitors individuals' accounts to ensure accuracy of charges and expenditures, maintains adequate reserves and allowances, and protects individuals' financial interests and resources.

- Provides technical assistance to agency facilities regarding reimbursement and benefits guidelines and the resolution of delinquent accounts.
- Maintains documentation of individuals' finances, insurance coverage, and associated data, and updates financial and billing tracking systems for an assigned caseload.

#### *Resources & Reimbursement Agent 2*

Performs the tasks of a Resources & Reimbursement Agent 1; and handles the more difficult cases with potential legal implications or without clear precedents, including appeals of contested or denied benefits and insurance claims.

May assist Resources & Reimbursement Agents 3 in the oversight of a field or facility-based reimbursement office.

Develops and implements training programs for new Resources & Reimbursement Agents 1 and may train other staff on agency policies regarding benefits and reimbursement.

May supervise Resources & Reimbursement Agents 1 and/or support staff and perform the full range of supervisory duties.

#### *Resources & Reimbursement Agent 3*

Performs the tasks of Resources & Reimbursement Agents 1 and 2 and oversees the operations of a field or facility-based reimbursement office.

- Assists in the development of statewide reimbursement policies and procedures.
- Serves as the primary resources and reimbursement liaison to facilities, network service providers, and outside agencies.
- Reviews cases of possible fraud or mismanagement of individuals' assets and resolves losses, including recommendations for court action.
- May visit and inspect field offices to evaluate operations.

Performs the full range of supervisory duties over Resources & Reimbursement Agents 1 and 2.

#### *Resources & Reimbursement Agent 4*

In addition to performing any of the above tasks, manages administrative or system units dealing with revenue in Central Office or a district and its decentralized field offices.

- Reviews cases with critical policy or legal impact and provides expertise on legal issues surrounding resources and reimbursement activities.
- Develops and maintains reimbursement office policies and procedures to ensure compliance with agency, federal, and State regulations and policies.
- Designs, implements, and oversees resources and reimbursement programs and projects.
- Acts as liaison and negotiates at the highest-level with various federal, State, and local entities to facilitate the provision of benefits.

Oversees new technological systems for the management of financial data and the automation of resources and reimbursement functions; and analyzes systems issues and coordinates solutions with technical staff.

Leads statewide and regional resources and reimbursement training sessions and meetings.

Performs the full range of supervisory duties over lower-level Resources & Reimbursement Agents.

### Minimum Qualifications

#### *Resources & Reimbursement Agent 1*

Open Competitive: a bachelor's degree and completion of a two-year traineeship.

#### *Resources & Reimbursement Agent 2*

Promotion: one year of service as a Resources & Reimbursement Agent 1.

#### *Resources & Reimbursement Agent 3*

Promotion: one year of service as a Resources & Reimbursement Agent 1 or Resources & Reimbursement Agent 2.

#### *Resources & Reimbursement Agent 4*

Promotion: one year of service as a Resources & Reimbursement Agent 3.

**Note:** Classification Standards illustrate the nature, extent, and scope of duties and

responsibilities of the classes they describe. Standards cannot and do not include all the work that might be appropriately performed by a class. The minimum qualifications above are those which were required for appointment at the time the Classification Standard was written. Please contact the Division of Staffing Services for current information on minimum requirements for appointment or examination.

Date: 9/2021

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