



Multnomah County Agenda Placement Request Budget Modification

(Revised 9/23/13)

Board Clerk Use Only

Meeting Date: _____

Agenda Item #: _____

Est. Start Time: _____

Date Submitted: _____

Agenda Title: BUDGET MODIFICATION # HD-01-18: Authorizing nine position reclassifications within the Health Department

Requested Meeting Date: _____ **Time Needed:** N/A - Consent

Department: 40 - Health Department **Division:** Human Resources, Business Operations, Public Health, Integrated Clinical Services,

Contact(s): Angel Landron-Gonzalez – Finance & Budget Manager

Phone: (503) 988-7438 **Ext.** 87438 **I/O Address** 167/2/210

Presenter Name(s) & Title(s): N/A (Consent Agenda)

General Information

1. What action are you requesting from the Board?

Approval of staffing adjustment resulting from the reclassification of nine positions. This change will not impact the Health Department's total FTE for FY 2018.

2. Please provide sufficient background information for the Board and the public to understand this issue. Please note which Program Offer this action affects and how it impacts the results.

Reclassify a 1.00 FTE Finance Technician to a 1.00 FTE Finance Specialist 1, position 705058, in the Business Operations Division of the Health Department. Class Comp approved the reclassification effective 11/8/16 (reclassification #3731). This position is responsible for maximizing county revenue by billing Medicare, Medicare CareOregon, HealthNet, United Healthcare, and Humana Insurance companies for charges from all clinics and following through to completion until payment is received; evaluating billing work queues by analyzing, researching, interpreting, and applying guidelines, rules, and regulations to all denied and unpaid claims; reviewing and researching adjustments; coding denials; updating denial codes; calling and/or appealing denied claims; updating patient insurance coverage information; reporting EPIC system issues; reviewing and identifying all claims not accepted/submitted to payer and evaluating discrepancies between the different systems and EPIC; researching, fixing, and correcting errors and resubmitting claims for payments; researching, adjusting, and canceling return to provider

(RTP) claims directly with Medicare; answering questions from clinics regarding insurance questions on eligibility, coverage, and patient accounts; using Generally Accepted Accounting Principles to perform Accounts Receivables remittance payment postings; tracking payments in EPIC and SAP; balancing and reconciling EPIC payment batches to the SAP deposits; evaluating, researching, and identifying monies not related to medical billing; analyzing charges and payments in EPIC and applying undistributed monies and/or reposting payments as needed; and identifying and initiating payer credits and refunds.

This change impacts program offer 40041 – Medical Accounts Receivable.

Reclassify a 1.00 FTE Program Specialist Senior to a 1.00 FTE Project Manager Represented, position 718235, in the Human Resources Division of the Health Department. Class Comp approved the reclassification effective 11/11/16 (reclassification #3735). This position is responsible for creating department-wide systemic impact to fully integrate trauma-informed equity principles and practices in policies, procedures, trainings, and service delivery. The position is responsible for leading multi-stakeholder project teams; developing and monitoring project plans, schedules, and budgets; communicating progress to stakeholders; using change management principles when working with employees and managers; identifying problems and barriers; developing mitigation strategies; identifying training needs related to projects and plans, and coordinating and/or conducting training; documenting processes, procedures, and business requirements; modifying project plans as necessary to account for unforeseen changes or unexpected developments; representing the department in meetings, hearings, committees, and other venues connected to project planning, goals, and status; drafting and developing plans and policies; organizing, facilitating, and participating in stakeholder group meetings; defining project scopes, milestones, levels of involvement, staffing, training, and resources; clarifying deliverables and identifying available resources; participating in strategic planning sessions and budget meetings to determine priorities, needs, resource allocation, and strategies; providing technical expertise regarding training design, delivery methods, techniques, approaches, and goals; and negotiating training contracts.

This change impacts program offer 40039 – Human Resources and Training.

Reclassify a 1.00 FTE Principal Investigator to a 1.00 FTE Program Supervisor, position 701080, in the Public Health Division of the Health Department. Class Comp approved the reclassification effective 7/1/17 (reclassification #3758). This position is responsible for supervising activities of the Community Capacitation Center (CCC); planning, prioritizing, assigning, supervising, and reviewing the work of staff; developing and revising work processes; managing performance and working with staff to correct deficiencies; recommending and implementing policies and procedures; preparing necessary evaluation reports for a variety of funders; participating in the development and administration of budget and contracts; participating in forecasting and obtaining additional funds for staffing and resources; analyzing and reviewing laws, regulations, policies, and procedures to ensure compliance; conducting analysis on best practices and trends and formulating/implementing recommendations; preparing various reports on operations and activities; representing the CCC externally; responding to and resolving confidential and sensitive inquiries; providing expert guidance to other departments, the general public, and/or outside agencies; investigating complaints and recommending corrective actions as necessary; supporting the Capacitation Team Coordinator and members to identify topics, develop curricula, develop and publicize initial and on-going training schedules; developing and presenting training workshops; developing lesson plans and materials; evaluating and adapting workshops based on feedback; and developing and maintaining partnerships with Portland State University to provide academic credit for training courses.

This change impacts program offers 40038 – Health Promotion and Community Capacity Building, 40012 – Services for Persons Living with HIV, and 40060 – Chronic Disease and Violence Prevention

Reclassify a 0.90 FTE Program Specialist Senior to a 0.90 FTE Program Supervisor, position 716838, in the Integrated Clinical Services Division of the Health Department. Class Comp

approved the reclassification effective 7/2/17 (reclassification #3760). This position is responsible for supervising HIV Health Services Center medical case management and patient navigation staff and services; providing day-to-day supervision of staff, including prioritizing, assigning, and reviewing work; interviewing, recommending and hiring new staff; providing or arranging for staff training; evaluating performance and recommending/initiating personnel actions; developing and revising workflows and procedures; establishing work schedules and monitoring work performed; reporting concerns about professional performance to the appropriate State of Oregon board; reviewing, interpreting, analyzing, and disseminating federal application guidance notices, changes to federal rules/regulations as related to grants, and other pertinent documents; facilitating work groups to prepare applications, reports, and communications in support of clinic grants; writing, coordinating, and submitting progress reports as required by funders; developing and monitoring grants, contracts, and clinic budgets; reviewing and approving monthly grant draws and contract invoices; meeting with officials and community partners to explain program goals and to negotiate agreements or purchases; convening and facilitating work groups to capture and report fiscal and clinical data; and ensuring compliance with all policies, laws, rules and regulations. This change impacts program offer 40012 – Services for Persons Living with HIV.

Reclassify a 1.00 FTE Finance Specialist 2 to a 1.00 FTE Finance Specialist Senior, position 703084, in the Business Operations Division of the Health Department. Class Comp approved the reclassification effective 7/2/17 (reclassification #3763). This position is responsible for managing the largest, and most technically complex portfolio of grants within the department's Grants Management unit; performing complex professional accounting, budgeting, auditing, financial analysis, and grants management for internal and external partners; preparing extensive reports, exhibits, and other supporting documents detailing financial soundness, compliance, grant/funding requirements, and recommendations; developing and monitoring complex program budgets; advising and recommending budget adjustments or changes in program activities; independently preparing, monitoring, and auditing financial plans for assigned programs and making recommendations to senior managers; investigating, researching, and auditing program activities and agencies to ensure compliance, including reviewing balance sheets, income statements, and audits; preparing and/or reviewing grant and funding reports for timeliness, completeness, and accuracy; examining the adequacy of the program and contractor internal routines and controls; reviewing the scope and adequacy of internal and external audits; determining and recommending corrective actions to management regarding program operations; collecting and analyzing data to detect deficient controls, duplicated efforts, inefficiencies/waste, fraud, or non-compliance with laws, regulations, and policies; developing and implementing new grant reporting templates; and performing special projects and special billings as requested. This change impacts program offer 40040 – Budget & Finance.

Reclassify a 1.00 FTE Manager 1 to a 1.00 FTE Nursing Development Consultant, position 712759, in the Integrated Clinical Services Division of the Health Department. Class Comp approved the reclassification effective 7/1/17 (reclassification #3761). This position is responsible for developing and organizing new employee orientation, including job specific knowledge, skills, and abilities; revising and updating orientation materials for area specific nursing staff; creating and providing oversight for the development of online learning modules and other training materials; developing and standardizing protocols, procedures, and workflows in collaboration with area leadership and the Quality Director; providing nursing consultation and leading select quality improvement initiatives; participating in certification processes, audits, and onsite visitation for local, regional, and national agency standards reviews; partnering with other staff and union stewards/representatives on communication plans for new or updated protocols, procedures, and workflows and the effect on collective bargaining agreements; developing, organizing, and implementing program/training materials to address ongoing clinical learning needs of staff; initiating training plans where performance gaps are recognized; ensuring all protocols, practices, and policies are consistent with role licensure and scope of practice; serving as liaison and resource to leadership; providing onsite assistance to specific nursing staff on technical skills, best practices, and workflows; performing focused competency assessments; and auditing worksites for

performance to ensure sustained compliance to standards.
This change impacts program offer 40034 – Quality Assurance.

Reclassify a 0.80 FTE Clinical Services Specialist to a 0.80 FTE Clinical Psychologist, position 714528, in the Integrated Clinical Services Division of the Health Department. Class Comp approved the reclassification effective 6/30/17 (reclassification #3774). This position is responsible for providing biopsychosocial assessments and evidence-based psychotherapy interventions directly to patients; participating in group medical appointments as requested by primary care team members; providing for unscheduled consultative appointments when referred by another primary care team provider; providing expert behavioral health clinical consultation and education to the Primary Care Provider teams; providing feedback to primary care providers regarding consultation findings and recommendations; formulating diagnostic and treatment recommendations and presenting findings to treatment teams; teaching primary care staff members about behavioral health care topics; responding to crisis situations; providing motivational enhancement and cognitive-behavioral interventions to improve a patient's management of chronic disease; assisting in the professional continuing education and development of other staff members; providing behavioral and mental health assessment, diagnosis, and brief evidence-based cognitive-behavioral interventions to patients; and providing case management services to patients. This change impacts program offer 40029 – Rockwood Community Health Clinic.

Reclassify a 1.00 FTE Finance Technician to a 1.00 FTE Finance Specialist 2, position 702099, in the Business Operations Division of the Health Department. Class Comp approved the reclassification effective 6/22/17 (reclassification #3776). This position is responsible for performing the full range of operational functions including reconciliations and prepared related worksheets; proofing and scheduling A/R activities including case clearing, allocation alternative payment method, and FQHC Wraparound payments; coordinating and reviewing the work of other A/R staff in making entries, performing reconciliations and other financial record keeping work; preparing and analyzing performance data compared to benchmark and standards; advising and recommending changes to improve team performance; leading year-end closing processes; reviewing and approving requests for accrual of outstanding expenses and monitoring accruals to ensure they are cleared in a timely manner; interpreting and applying laws, rules, regulations, policies, and procedures; monitoring, coordinating, and adjusting fiscal systems; working with grant accountants and program staff to ensure charges are accurate and timely; developing and implementing auditing systems; conducting internal audits to ensure compliance; assisting auditors in their field work; providing 1:1 training to staff in A/R processes; overseeing cash handling and bank deposits; and providing functional and technical supervision to cash management staff. This change impacts program offer 40040 – Budget and Finance.

Reclassify a 1.00 FTE Finance Technician to a 1.00 FTE Finance Specialist 1, position 712268, in the Business Operations Division of the Health Department. Class Comp approved the reclassification effective 12/20/16 (reclassification #3769). This position is responsible for maximizing county revenue by billing FamilyCare Medicare, FamilyCare Medicaid, Regence Blue Cross Blue Shield Medicare, Regence Blue Cross Blue Shield of Oregon, Care Assist, and CC Insurance companies for charges from all clinics and following through to completion until payment is received. The position is responsible for evaluating billing work queues by analyzing, researching, interpreting, and applying guidelines, rules, and regulations to all denied and unpaid claims; reviewing and researching adjustments and coding denials; updating denial codes; calling and/or appealing denied claims; updating patient insurance coverage information; reporting EPIC system issues; researching, fixing, and correcting errors and resubmitting claims for payments; answering questions from clinics regarding insurance questions on eligibility, coverage, and patient accounts; using Generally Accepted Accounting Principles to perform Accounts Receivables remittance payment postings; tracking payments in EPIC and SAP; balancing and reconciling EPIC payment batches to the SAP deposits; evaluating, researching, and identifying monies not related to medical billing; analyzing charges and payments in EPIC and applying undistributed monies and/or reposting payments as needed; and identifying and initiating payer credits and

refunds.

This change impacts program offer 40041 – Medical Accounts Receivable.

3. Explain the fiscal impact (current year and ongoing).

This budget modification has no fiscal impact in the current year. Budgeted personnel costs are within the pay scales of the new classifications or other budgeted line items have been adjusted so that the changes are budget neutral.

The reclassification of position 705058 to a Finance Specialist 1 increased budgeted personnel cost by \$909, because the step at which the Finance Specialist 1 is budgeted is higher than the step at which the Finance Technician is budgeted. The increase in cost is offset by a decrease in Supplies, for no net fiscal impact this fiscal year.

The reclassification of position 718235 to a Project Manager Represented is budget neutral, because the current budgeted pay for the position falls within the pay-scale of the new classification.

The reclassification of position 701080 to a Program Supervisor decreased budgeted personnel cost by \$68,832, because the step at which the Program Supervisor is budgeted is lower than the step at which the Principal Investigator is budgeted. The decrease in cost is offset by an increase in Temporary, Non-Base Fringe and Non-Base Insurance, for no net fiscal impact this fiscal year.

The reclassification of position 716838 to a Program Supervisor decreased budgeted personnel cost by \$21,459, because the step at which the Program Supervisor is budgeted is lower than the step at which the Program Specialist Senior is budgeted. The decrease in cost is offset by an increase in Temporary, Non-Base Fringe and Non-Base Insurance, for no net fiscal impact this fiscal year.

The reclassification of position 703084 to a Finance Specialist Senior increased budgeted personnel cost by \$5,587, because the step at which the Finance Specialist Senior is budgeted is higher than the step at which the Finance Specialist 2 is budgeted. The increase in cost is offset by a decrease in Overtime, for no net fiscal impact this fiscal year.

The reclassification of position 712759 to a Nursing Development Consultant decreased budgeted personnel cost by \$40,766, because the step at which the Nursing Development Consultant is budgeted is lower than the step at which the Manager 1 is budgeted. The decrease in cost is offset by an increase in Temporary, Non-Base Fringe and Non-Base Insurance, for no net fiscal impact this fiscal year.

The reclassification of position 714528 to a Clinical Psychologist decreased budgeted personnel cost by \$982, because the step at which the Clinical Psychologist is budgeted is lower than the step at which the Clinical Services Specialist is budgeted. The decrease in cost is offset by an increase in Overtime, for no net fiscal impact this fiscal year.

The reclassification of position 702099 to a Finance Specialist 2 increased budgeted personnel cost by \$2,979, because the step at which the Finance Specialist 2 is budgeted is higher than the step at which the Finance Technician is budgeted. The increase in cost is offset by a decrease in Temp, for no net fiscal impact this fiscal year.

The reclassification of position 712268 to a Finance Specialist 1 increased budgeted personnel cost by \$5,802, because the step at which the Finance Specialist 2 is budgeted is higher than the step at which the Finance Technician is budgeted. The increase in cost is offset by a decrease in Supplies, for no net fiscal impact this fiscal year.

In subsequent fiscal years, the reclassified positions will be subject to approved cost of living

adjustments (COLA) and step and merit pay increases in accordance with collective bargaining agreements and county personnel rules. Increased costs will be funded within the department's budget.

4. Explain any legal and/or policy issues involved.

N/A

5. Explain any citizen or other government participation.

N/A

Budget Modification

6. What revenue is being changed and why? If the revenue is from a federal source, please list the Catalog of Federal Assistance Number (CFDA).

No change in revenues.

7. What budgets are increased/decreased?

The Health Department's budget will have the following changes:

- Permanent personnel budget will decrease by \$69,383
- Salary related expense budget will decrease by \$42,454
- Insurance benefits budget will decrease by \$4,925
- Temporary personnel budget will increase by \$81,784
- Non Base Fringe budget will increase by \$40,276
- Non Base Insurance budget will increase by \$6,018
- Overtime budget will decrease by \$4,605
- Supplies budget will decrease by \$6,711

These changes will have no financial impact on the budget and do not change the Health Department's total FTE.

8. What do the changes accomplish?

Changes of classification for positions 705058, 718235, 701080, 716838, 703084, 712759, 714528, 702099, and 712268 better fit the duties of these positions as determined by the Class/Comp Unit of Central Human Resources.

9. Do any personnel actions result from this budget modification?

Reclassify a 1.00 FTE Finance Technician to a 1.00 FTE Finance Specialist 1, position 705058, in the Business Operations Division of the Health Department. Class Comp approved the #3731

Reclassify a 1.00 FTE Program Specialist Senior to a 1.00 FTE Project Manager Represented, position 718235, in the Human Resources Division of the Health Department. Class Comp approved #3735.

Reclassify a 1.00 FTE Principal Investigator to a 1.00 FTE Program Supervisor, position 701080, in the Public Health Division of the Health Department. Class Comp approved #3758.

Reclassify a 0.90 FTE Program Specialist Senior to a 0.90 FTE Program Supervisor, position 716838, in the Integrated Clinical Services Division of the Health Department. Class Comp approved #3760.

Reclassify a 1.00 FTE Finance Specialist 2 to a 1.00 FTE Finance Specialist Senior, position 703084, in the Business Operations Division of the Health Department. Class Comp approved #3763.

Reclassify a 1.00 FTE Manager 1 to a 1.00 FTE Nursing Development Consultant, position 712759, in the Integrated Clinical Services Division of the Health Department. Class Comp approved #3761.

Reclassify a 0.80 FTE Clinical Services Specialist to a 0.80 FTE Clinical Psychologist, position 714528, in the Integrated Clinical Services Division of the Health Department. Class Comp approved #3774.

Reclassify a 1.00 FTE Finance Technician to a 1.00 FTE Finance Specialist 2, position 702099, in the Business Operations Division of the Health Department. Class Comp approved the #3776.

Reclassify a 1.00 FTE Finance Technician to a 1.00 FTE Finance Specialist 1, position 712268, in the Business Operations Division of the Health Department. Class Comp approved the #3769.

10. If a grant, is 100% of the central and department indirect recovered? If not, please explain why.

N/A

11. Is the revenue one-time-only in nature? Will the function be ongoing? What plans are in place to identify a sufficient ongoing funding stream?

N/A

12. If a grant, what period does the grant cover? When the grant expires, what are funding plans? Are there any particular stipulations required by the grant (e.g. cash match, in kind match, reporting requirements, etc)?

N/A

Required Signature

Elected Official or Dept. Director:	_____	Date:	_____
Budget Analyst:	_____	Date:	_____
Department HR:	_____	Date:	_____
Countywide HR:	_____	Date:	_____