



**HARRIS COUNTY  
HOSPITAL DISTRICT**

**PATIENT ELIGIBILITY  
SERVICES  
OPERATIONS MANUAL**

Policy No: 1.30  
Page Number: 1 of 3

Effective Date: 08/01/02  
Approved By:

*M. Allen Peckel 8/1/02*

**TITLE: EDUCATION AND TRAINING**

**PURPOSE:** To define education and training requirements for Patient Eligibility Services staff.

**POLICY STATEMENT:**

To help ensure that financial assistance policies are applied consistently to all clients, Patient Eligibility Services staff will receive education and training regarding District financial assistance policies and procedures on a recurring basis.

**POLICY ELABORATION:**

**I. OVERVIEW**

- A. Each staff member will receive a full copy of the eligibility policies and procedures at the time of employment. Staff are expected to abide by all policies and procedures.
- B. Updates and clarifications of policies and procedures are the responsibility of Patient Eligibility Services Administration and may be issued via memorandum, revisions to existing policies and procedures, or on-site visits.
- C. Managers are expected to meet with staff frequently to review policy and to discuss any additions or modifications to policy. Managers should also use feedback from the Eligibility Audit department to continually train and update staff.



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- D. Formal training on financial assistance policies and procedures is offered by the Information Systems Education department and is designed in conjunction with Patient Eligibility Services Administration. The Information Systems Education department also provides software training on the TPASS2 product.

**II. INITIAL TRAINING**

- A. All new eligibility staff are required to attend formal eligibility training and TPASS2 training within the first 90 days of employment. Training will consist of policy review, exercises, and hands-on computer training. Staff will be required to pass course exams with a minimum score of 95% in order to continue employment beyond the 90-day probationary period.

**III. ANNUAL TRAINING**

- A. All eligibility staff are required to attend annual refresher training. The session shall review key eligibility concepts. Staff are required to pass the refresher training exam with a minimum score of 95%, or progressive disciplinary action will occur.

**IV. PROGRESSIVE COUNSELING**

- A. In the event an employee fails the annual refresher course, disciplinary action will occur.
- B. Employees scoring between 90% and 94% will receive a verbal counseling. Employees must also retake the exam within 90 days and attain a score of 95% or higher.



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- C. Employees scoring below 90%, or employees who retake the exam and fail to attain an acceptable score, will receive a written warning and will be placed on 90-day probation. The employee must retake the formal eligibility training class during the probationary period and must pass the exam with a score of 95% or higher. While on probation, employees must also demonstrate an acceptable productivity and accuracy rate as determined by the current job addendum.
  
- D. Employees who are placed on probation and fail to meet any of the criteria outlined in section C are subject to termination at the end of the probationary period.

**REFERENCES/BIBLIOGRAPHY:**

Eligibility Counselor job addendum

**OFFICE OF PRIMARY RESPONSIBILITY:** Patient Eligibility Services  
Administration