



This workshop is the first step toward credentialing in the exciting and rapidly emerging profession of private healthcare advocacy.

University of California,  
Berkeley  
Clark Kerr Campus

**February 27th & 28th, 2010**  
8:30 a.m. to 4:30 p.m.

## What is Private Healthcare Advocacy?



As healthcare systems in the US become more complex, and access to appropriate healthcare continues to be more problematic, a new profession called **private healthcare advocacy** is emerging. Private healthcare advocates work independently with people of all ages, assisting them in navigating through complex medical systems.

## The Need for Accreditation

Because there are currently no professional standards or requirements, consumers seeking the assistance of a **private healthcare advocate** have no reliable way to assess the expertise, ethics and business practices of an individual practitioner.

**Healthcare Liaison** has responded to this situation by creating the first credentialing process for private healthcare advocates. This course is designed as the first step toward that credential. Qualified participants who complete this course may inquire about additional requirements for credentialing.

## Consumers are turning to private healthcare advocates for assistance with a number of healthcare related issues, including:

- New diagnoses
- Treatment options
- Care plans
- Case management
- Placement issues
- Insurance
- Community resources

Private healthcare advocates work directly for their clients and do not receive reimbursement from any other source.

## Workshop Outline

### **Health Systems Overview**

- Outpatient • In-patient • Rehab
- Skilled Nursing
- Home Health • Hospice

### **Healthcare Advocacy**

- Definition • History • Perspective
- Advocacy and Coaching
- Need for Credentialing

### **Starting with a Client**

- Needs assessment • Goal Setting
- Advance Planning
- Crisis Planning • Family goals

### **The Health Advocacy Practitioner**

- Values • Beliefs
- Solo or team? • Support

### **Health 2.0**

- Trends • Tools
- Electronic Medical Records

### **Starting a Small Business**

- Business Models
- Business Structures
- Licenses, Permits

### **Care Coordination**

- UR and Discharge Planning
- System Conflicts • Home-based

### **Insurance**

- Private insurance • Medicare
- Medi-cal • The Uninsured
- Long Term Care

### **Dynamics of Negotiation**

- Insurers • Flexible policies
- Grievances and Appeals

### **Bioethics**

- Goal setting • Futility
- Ethics of referrals

## Workshop Objectives

**At the end of this workshop, you will be able to:**

1. Define and describe the emerging field of private healthcare advocacy
2. Describe two aspects of private healthcare advocacy advance planning and how they differ from crisis planning
3. List two basic system conflicts between UR and discharge planning and how they impact patients
4. Identify three necessary skills to working effectively with out-patient physicians on behalf of patients
5. Describe the entire continuum of care for both in-patient and out-patient systems
6. List three key provisions for both the Medi-cal and Medicare systems
7. Describe Health 2.0 and how insurers and consumer are using the concept
8. List two key strategies for providing private healthcare advocacy to infants and children and their families.



## Workshop Leader



The course will be taught by Joanna Smith, LCSW, MPH, Founder and CEO of Healthcare Liaison. She has 25 years experience in the fields of health, public health and mental health,

working as a medical social worker and hospital discharge planner in healthcare systems throughout the San Francisco Bay Area. A former Director of medical social work and discharge planning at DRG in South San Francisco, Joanna also has training in utilization review and case management. Previous experience also includes work in home health and community-based agencies.

Joanna received her undergraduate degree at the University of Vermont (1970) and then received her Masters in Social Work degree from Tulane University in 1978. She also holds a Masters in Public Health degree from the University of California, Berkeley (1985) with a specialization in Maternal and Child Health.

In 2007 Joanna established the first credentialing program in the country for private healthcare advocates. In 2009 she founded the National Association of Healthcare Advocacy Consultants ([www.nahac.com](http://www.nahac.com)) and currently serves as NAHAC President.

## Workshop Daily Schedule

- 8:30 a.m. check in and coffee
- 9:00 a.m. workshop begins
- noon-1 p.m. lunch (on your own)
- 4:30 p.m. workshop ends

## Cost of Workshop

\$375 for both days  
(single day registration not available)  
Includes manual and continental breakfast

[www.healthcareliaison.com](http://www.healthcareliaison.com)

**TO REGISTER**, please go to [www.healthcareliaison.com/workshops](http://www.healthcareliaison.com/workshops).

Enrollment will be confirmed by e-mail once payment is received.

Approved by the California Board of Registered Nursing, Provider #14972 for 11 contact hours.



3030 Ashby Ave. Suite 105, Berkeley, CA 94705

Cancellation policy: Cancellations received at least 14 days prior to the workshop will be refunded, minus a \$50 processing fee.

For more information, call Healthcare Liaison: 510-704-8476  
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