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 2005 Joanna founded Healthcare Liaison, the first private healthcare advocacy practice in the San Francisco Bay Area. She has a thorough knowledge of both public and private sector healthcare systems and a special interest in cross-cultural issues in healthcare.

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

$365 for both days
(single day registration not available)
Includes manual and refreshments

www.healthcareliaison.com

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

TO REGISTER, please please go to **www.healthcareliaison.com/workshops**. Enrollment will be confirmed by e-mail once payment is received.

HEALTHCARE LIAISON, INC.®

303 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
e-mail: joanna@healthcareliaison.com

HEALTHCARE LIAISON, INC.®

Becoming a **Private Healthcare Advocate**

11 Steps to a New Career in Healthcare

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

May 2nd and 3rd, 2009
8:30 a.m. - 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.

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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.