

## Job Description

**Job Title:** Case Manager **Division:** Behavioral Health  
**Created:** 08/01/2014 **Amended:**  
**Job Code:** CM-40 **Role:** Clinical **Function:** Direct Care **Wage & Hour Status:** Non-Exempt

<b>Employee Name:</b>	<b>Dept Name/RU:</b>
<b>Supervisor:</b>	<b>Positions Supervised:</b>
Component Director	None

### POSITION SUMMARY

The purpose of case management is to assist individuals in gaining access to needed medical, social, educational and other services.

The primary goal of case management is to optimize the functioning of individuals who have complex needs by coordinating the provision of quality treatment and support services in the most efficient and effective manner. The desired outcomes for persons using the service system are self sufficiency and satisfaction in the living, learning, work and social environments of their choice. To help persons optimize natural systems of support to their greatest advantage to promote recovery and develop resiliency.

The case manager provides support to the individual through assessment, monitoring, linkage, coordination, referral, and advocacy.

**Expected to maintain a performance evaluation score of 3 or greater on each measured item.**

To perform this job, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### MINIMUM QUALIFICATIONS (required for an interview)

- Bachelor's degree from an accredited university or college with a major in counseling, social work, psychology, criminal justice, nursing, rehabilitation, special education, health education, or a related human services field (a human services related discipline is one in which major course work includes the study of human behavior and development) AND a minimum of one year of full time or equivalent experience working with:
  - adults experiencing serious mental illness
  - children with serious emotional disturbances

OR

- Bachelor’s degree from an accredited university or college AND three years full time or equivalent experience working with:

- adults experiencing serious mental illness
- children with serious emotional disturbances

- Ability to provide transportation of clients in personal vehicle and acquire minimum insurance coverage needed: personal injury protection (PIP) and liability coverage to at least \$100,000/\$300,000.
- Ability to provide individualized, substance use, and co-occurring services to meet the needs of individuals served and their families.
- Ability to complete approved mental health targeted case management training within three months of initially providing Medicaid services.
- Must have knowledge of and comply with state and federal statutes, rules and policies that effect the target population.
- All employees are required to have basic computer skills. These basic skills will include knowledge of creating folders, saving and retrieving files, e-mail (Outlook), MS Office (Word and Excel), using web browsers such as Internet Explorer and/or Mozilla Firefox, along with operating a keyboard, mouse, and printer.
- Meet minimum standards for screening of mental health personnel as contained in F.S. 394.4572
- Possess a valid Florida Driver’s license
- Be insurable under LMC’s automobile plan
- Requires reliable travel to clients’ homes, training locations, and other locations as necessary

**WAGE & PRODUCTIVITY MINIMUM**

Level	Annual Salary	Minimum Monthly Direct Service Productivity
Level 1	\$30,000	105
	<i>Proficiency in productivity is expected by 4 months.</i> Eligible to move to Level 2 after maintaining a monthly average of 115 for 6 months	
Level 2	\$33,000	115
	Level 2 must sustain overall competency score of at least 3.0 Eligible to move to Level 3 after maintaining a monthly average of 125 for 6 months	
Level 3	\$36,000	125
	Level 3 must sustain overall competency score greater than 3.0 Eligible to move to Level 4 after maintaining monthly average of 135 for 6 months	
Level 4	\$40,000	135
	Level 4 must sustain overall competency score greater than 3.6	

Upkeep of quality assurance documentation standards is required at all levels.

Maintenance of the minimum monthly productivity is expected at each review point (every 6 months or more as applicable).

**Direct Services:**

Case Management Service  
Case Management Assessment  
Assessment Update  
Service Plan & Service Plan Reviews  
Treatment Plan & Treatment Plan Reviews  
OMI & FARS completion (actual time up to 15 minutes each)  
Monitoring at FL State Hospital, North Florida State Hospital, North Florida Evaluation & Treatment Center, including travel time  
Mandatory Training (as approved by Program Director)

**Forensic Only:**

Court Outreach  
Competency Restoration  
Jail OP  
Court Monitoring

**CCST Only:**

CCST Case Managers are allowed up to 20 hours of credit towards productivity for Non-Direct Services.  
CCST Service Note  
Travel  
Case Note NB (Non-Billable)  
ROI (Release of Information forms)  
Discharges  
Documentation

**POSITION COMPETENCIES**

***I. Competency: Interview, gather, and interpret clinical data***

1. Explains in assessment the circumstances that prompted services and considers information from the client, family and significant others and collateral resources to include current and past treatment records.
2. Assesses needs for physical health and mental health needs, abstinence from substance use and effectiveness of current/past services & interventions.
3. Assesses relationships with environmental supports including natural support system and family relationships
4. Assesses personal current and potential strengths
5. Assesses emotional, social, behavioral and developmental functioning and needs within the home, school, work place and community
6. Includes a home visit within 30 days of Case Management Certification that assesses the safety and wellbeing of the client
7. Case management assessment is current and updated every six months and at significant life event junctures.
8. Clearly forms the basis for the service plan.

**II. Competency: Use assessment information to develop an individualized service plan and service plan review**

1. Develops a service plan that clearly relates to the service assessment. Each area of identified need that is discussed in the assessment is addressed in the plan and all plan service need areas are discussed in the assessment
2. Assures that the service plan is developed in partnership with the client, parent/guardian/ legal custodian (if applicable), service providers and other significant to the implementation of the plan
3. Assures and documents that the client, parent/guardian/ legal custodian (if applicable) receives service plan
4. Specifies objectives that are measurable and outlines the strategy (intervention for how the goals will be achieved) including activities of the case manager, client and family members
5. Specifies time frame for achievement of service plan components and the name of the individual or agency responsible for providing the specific assistance or services
6. Reviews/revises service plan every 6 months or at significant life junctures including comments on the status of each service plan component
7. Expresses justification for purchase of service with state funding (e.g., SAMH, TANF) with specific explanation as to why the expenditure is needed to meet service plan goals and objectives.

**III. Competency: Provide individualized, person-centered case management services**

1. Provides individualized case management services based on the service plan and identifies SNAP (*Strengths, Needs, Abilities, Preferences*)
2. Assures that service goals/objectives clearly justify expenditures made with state funding (e.g., payment of utility bill, purchase of clothing).
3. Ensures implementation of the service plan through a variety of monitoring, planning, advocating, and assessing activities designed to procure specified services, treatment and resources for the client
4. Monitors service plan goals and objectives and determines if any changes/updates are needed to the service plan
5. Provides supportive services to include working with the client's natural support system to develop and implement the service plan
6. Conducts discharge planning with the client (and involves significant others when available and appropriate)
7. Conduct monitoring as required by Medicaid Manual. Work closely with the individual, family or support system, and local providers to locate appropriate community placements and arrange for needed aftercare services for individuals determined appropriate for discharge. Intervene when necessary to resolve issues among stakeholders to ensure the process moves forward in a timely manner.
8. Establishes rapport with clients and families to foster engagement and develop a therapeutic relationship
9. Adapt evidence-based practice to the individual needs of the client (*EBPs include, but not limited to, Motivational Interviewing*)

**IV. Competency: Assess and respond to client risk**

1. Assess for risk and protective factors
2. Recognizes and responds to high risk factors including suicidal and homicidal ideation
3. Recognizes, responds to and defuses volatile or dangerous situations
4. Seeks supervision and consultation as needed in regard to safety management
5. Recognizes and manages transfers/hand-offs and other critical points in treatment (critical risk points include but are not limited to: initial contact; change or transfer of care; change in legal status; change in life events; change in mental status; change in physical condition; change to a less restrictive level of care; discharge from services)
6. Assess client's home for staff and client safety

## CORE ORGANIZATIONAL VALUES

*It is the mission of LMC to provide comprehensive, integrated care that promotes the health and quality of life of our community members.*

### ***V. Competency: Supports LMC's mission, values, and standards***

#### ***1. Maintain agency and program standards for documentation and EHR***

- Complete documentation within 24 hours of service occurrence.
- Complete documentation in an accurate and intelligible manner.
- Perform client related documentation in accordance with LMC policies and procedures, component specific guidelines, Medicaid and other third party requirements and contract provisions as applicable.

#### ***2. Adapt to changing requirements for service delivery***

- Respond quickly to changes in work requirements.
- Show flexibility in changing of schedule as needed.
- Be willing to take on additional responsibilities as requested.

#### ***3. Demonstrate initiative and self-reliance in the performance of job duties***

- Use good judgment in bringing issues to the attention of supervisor without depending on continuous input or deferring decisions.
- Work with cost consciousness.
- Participate in opportunities for program and Center development.
- Organize tasks, manage time well, and direct oneself.

#### ***4. Exhibit professional accountability***

- Refer to and follow Center Policies & Procedures.
- Perform job tasks in a manner that does not result in audit or monitoring problems.
- Provides appropriate notice for absences and late arrivals, and is not chronically absent or late.
- Accurately reports all hours worked on electronic time sheet by appropriate due date.

#### ***5. Maintain and enhance job skills***

- Respond to opportunities and requirements for skill development.
- Demonstrate openness to input on work issues from coworkers and supervisor.
- Participate/provide peer consultation/training.

#### ***6. Maintain productivity set by program/organization***

- Meet service delivery requirements for position.
- Maintain a work-focused atmosphere; share techniques for increasing productivity.
- Perform duties in a manner that expedites the work of other staff.
- Manage time, adhere to deadlines, and prioritize tasks.

### 7. *Comply with LMC safety policies and procedures*

- Report potential safety hazards on company property or in business execution.
- Obtain and give consultation in matters related to safety/risk management.
- Use good judgment in matters of safety and liability for which there is no prescribed procedure.
- Complete & submit Incident Reports according to written guidelines and procedures.

### 8. *Exhibit professionalism and ethics*

- Observe Center standards for ethical conduct.
- Observe professional standards for ethical conduct.
- Use Center resources for intended purposes.
- Respect the property and rights of coworkers.
- Submit accurate documentation for work done and reimbursement requested.

### 9. *Protect client and co-worker confidentiality*

- Follow established federal, state, and LMC guidelines on confidentiality.
- Access records only where the “need to know” exists.
- Shares information only where the “need to know” exists.
- Conversations are conducted with privacy in mind (phone conversations conducted with discretion, information is not discussed in public areas, etc.).

### 10. *Work effectively with Center staff, clients, and business associates*

- Communicate effectively with others using the spoken word.
- Appreciate and be sensitive to the feelings of others.
- Demonstrate tact, courtesy, and helpfulness in relating to community agencies, coworkers, clients, and other associates.
- Coordinate & communicate effectively with others.
- Respond to problems and conflict with solution-focused thinking.
- Work effectively with people regardless of race, color, religion, gender, age, citizenship, marital status, disability, or national origin.

### 11. *Demonstrate sensitivity to persons of varying backgrounds and needs*

- Attend to client needs in a thorough and timely manner.
- Speak of and to clients with dignity & respect.
- Be attuned to the presence of trauma indicators and project safety and trust in relating.
- Demonstrate client satisfaction (positive responses to client satisfaction surveys, minimal client requests to change counselor, an absence of warranted complaints, etc.)

## PROGRAM SPECIFIC FUNCTIONS

Checkmark below to assign program specific functions, if applicable:

**Forensic Case Management**

1. Monitor mentally ill individuals in the community and local jails at risk for commitment to the Department pursuant to Chapter 916, F.S. Advise the court evaluators and the attorneys of treatment alternatives for appropriate felony offenders including civil diversion and conditional release.

Employee Name:

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2. Maintain close working relationships with local Probation and Parole personnel, Pre-trial release personnel and Adult Living Facility personnel jail mental health personnel to coordinate services.
3. Act as substitute for Forensic Specialist in court as needed; be able to testify when required as to progress of clients on conditional release, availability of appropriate treatment alternatives for felony offenders.
4. Maintain close working relationships with the judicial assistants in the circuit, the Office of the Public Defender, the Office of the State Attorney, the Clerk of the Court's Office, Judges and Office of Probation and Parole.
5. Actively participate with state treatment facility staff in the development of the final competency evaluation summary to include aftercare recommendations including place of residence, case management services, medication management and other appropriate follow-up services determined necessary to allow for a successful transition to the community.

**POSITION SPECIFIC FUNCTIONS (approved by Program Director)**

*Position-specific functions are assigned only when the position has a substantial deviation from normal duties that would impact productivity requirements.*

Enter position-specific functions here- must be approved by Program Director

**PHYSICAL REQUIREMENTS (physical demands of job)**

- Must be able to hear conversational speech, visually observe client behaviors for safety and communicate effectively with clients and co-workers
- Vision requirements include close and distance vision

Activity	Expectation			
	Minimal	<b><u>Moderate</u></b>	Frequent	None
Standing	Minimal	<b><u>Moderate</u></b>	Frequent	None
Sitting	Minimal	Moderate	<b><u>Frequent</u></b>	None
Driving vehicles	Minimal	Moderate	<b><u>Frequent</u></b>	None
Lifting and/or Carrying	Minimal	<b><u>Moderate</u></b>	Frequent	None
Bending and/or Stooping	Minimal	<b><u>Moderate</u></b>	Frequent	None
Climbing Stairs and/or Ladders	Minimal	<b><u>Moderate</u></b>	Frequent	None
Walking or Moving (between offices, other facilities, etc.)	Minimal	<b><u>Moderate</u></b>	Frequent	None
Other (lift above waist/reaching etc., please explain)	Minimal	Moderate	Frequent	None

Speaking: **Yes** No  
 Hearing: **Yes** No  
 Reading Comprehension: **Yes** No  
 Repetitive motion with hands, wrists, arms: **Yes** No  
 (e.g keyboard, typing, handwriting, etc.)

Ability to lift and carry up to **15** pounds.

Ability to handle stressful situations: Minimal Moderate **Frequent**

Employee Name:

	Infrequent	Occasional	Frequent	N/A*
Travel Same Day			X	
Travel Overnight	X			
Overtime (Non-Exempt only)				X
Holidays/Weekends				X
Shift Work (PMs/Midnights)				X

\* Not Anticipated

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### POSITION TRAINING REQUIREMENTS

1. Center-wide New Employee Orientation
2. Mandatory annual training
3. Case Management Certification
4. CPR & First Aid Certification
5. Case Management Training requirements (*as assigned in training management system*)
- 6.

### TEAM PARTICIPATION (committees/teams in which the employee is expected to participate)

1. List mandatory teams here, if applicable

### EMPLOYEE SIGNED ACKNOWLEDGEMENT OF RECEIPT OF JOB DESCRIPTION

My signature below represents that I have read and understand my responsibilities as a Case Manager and that I am able to perform the essential functions of this position.

Employee Signature	Date
Supervisor Signature	Date