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 POSITION TITLE: CASE MANAGER – CM 5

SEPTEMBER 2020

REPORTS TO: Program Manager

SUPERVISES: None

STATUS: Non-Exempt

**SUMMARY:**

Provides information, assistance and comprehensive case management services to individuals or families. Assesses needs, develops and monitors implementation of service plans, makes appropriate referrals and serves as a customer advocate with other service providers. May be responsible for executing specific program standards and delivering or facilitating the delivery of program related services. Service areas could include youth/family/parenting/elder services, employment/training, emergency/transitional housing, and health/nutrition. Requires knowledge of related community resources and the laws and regulations specific to the area of service.

**GENERAL RESPONSIBILITIES:****Case Management:**

- \* Complete the initial interviews with the customer and his or her family to assess the customer's eligibility for services.
- \* Gather relevant and useful data from the customer, family, other agencies, and so on to formulate a psychosocial assessment of the customer and his or her family.
- \* Assemble and guide group discussions and decision-making sessions among relevant professionals and program representatives, the customer and his or her family, and significant others to formulate goals and design an integrated intervention plan.
- \* Monitor adherence to the plan and manage the flow of accurate information within the action system to maintain a goal orientation and coordination momentum.
- \* Provide "follow-along" to the customer and his or her family to speed identification of unexpected problems in service delivery and to serve as a general troubleshooter on behalf of the customer.
- \* Provide counseling and information to help the customer and his or her family in situations of crisis and conflict with service providers.
- \* Provide ongoing emotional support to the customer and his or her family so they can cope better with problems and utilize professionals and complex services.  
Complete the necessary paperwork to maintain documentation of customer progress and adherence to the plan by all concerned.
- \* Act as a liaison between the customer and his or her family and all relevant professionals, programs, and informal resources involved in the overall intervention plan to help the customer make his or her preferences known and secure the services needed.
- \* Act as a liaison between programs, providing services to the customer to insure the smooth flow of information and minimize conflict between the subsystems.
- \* Establish and maintain credibility and good public relations with significant formal and informal resource systems to mobilize resources for current and future customers.
- \* Perform effectively and as a professional within the organization to be in a position to develop and modify policies and procedures affecting customers and the effectiveness of the service delivery system.

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Secure and maintain the respect and support of those in positions of authority so their influence can be enlisted on behalf of the customer and used, when necessary, to encourage other individuals and agencies to participate in the coordination effort.

- \* Provide regularly scheduled in-home monitoring of assigned customers.
- \* Provide a wide variety of direct assistance including medical billing forms, tax inf., banking, entitlement applications, etc.

**Management:**

- \* Remain current on state and federal policy, requirements, laws and regulations governing program and services.
- \* Maintain systems and records that provide for the proper evaluation, control, and documentation of assigned operations.
- \* Prepare reports and correspondence as required.  
Perform other related duties as assigned.

**KNOWLEDGE, SKILLS, AND ABILITIES:**

- Knowledge of the dynamics of aging.
- Knowledge of crisis intervention and counseling principles and practices.
- Ability to prepare reports, correspondence and documentation.
- Ability to comprehend complex documents and concepts.
- Ability and willingness to maintain customer confidentiality.
- Ability to understand and apply federal, state and local policies, procedures and regulations applicable to the area of assignment.
- Capable of analyzing and evaluating customers needs and development and implementation of corrective action(s) to resolve issues.
- Ability to communicate effectively, both orally and in writing.
- Knowledge of computer applications including MS DOS, MS Word, Fox Pro.
- Ability to access and egress non-ADA facilities and homes.
- Ability to establish and maintain effective working relationships with agency staff, gatekeepers, and general public.

**EDUCATION AND EXPERIENCE:**

A Bachelor's degree in social or health sciences and two to three years related experience.

Note: Depending on the labor pool, work experience and the specific program, this requirement may receive an exemption, waiving the need for a Bachelor's degree.

**REQUIRED CERTIFICATION AND LICENSES:**

- Valid driver's license in state of residence.
- Auto insurance in the amount required by the State of Washington.
- Access to reliable transportation.
- Acceptable completion of a criminal history background check.
- Obtain tuberculosis (TB) vaccination within two weeks of employment.

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**PHYSICAL DEMANDS AND WORK ENVIRONMENT**

The physical demands described here are representative of those that must be met to successfully perform the essential functions of this job.

- While performing the duties of this job, the employee is regularly required to, stand, sit; talk, hear, and use hands and fingers to operate a computer and telephone, and keyboard reach.
- Specific vision abilities required by this job include close vision requirements due to computer work.
- Light to moderate lifting is required.
- Ability to uphold the stress of traveling.
- Regular, predictable attendance is required.

The work environment characteristics described are what is encountered while performing the essential functions of this job.

- Moderate noise (i.e. business office with computers, phone, and printers, light traffic).
- Ability to work in a confined area.
- Ability to sit at a computer terminal for an extended period.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

\* ***Denotes Essential Functions***