

Position Title: Case Manager or Trainee, **Senior and Independent Living Services**

August 2024

Reports to: Program Manager, Senior and Independent Living Services

Supervises: None

Status: Non-exempt

Summary:

Provides comprehensive case management services to individuals or families on assigned Senior & Independent Living Services program(s). Assesses needs, develops and monitors implementation of service plans, makes appropriate referrals and serves as a client advocate with other service providers. Responsible for executing specific program standards and delivering or facilitating the delivery of program related services. Requires knowledge of related community resources and the laws and regulations specific to the area of service.

General Responsibilities (essential functions):

- Complete the initial interviews with clients and their families to assess the customer's eligibility for services.
- Gather relevant and useful data from the client, family, other agencies, to formulate a psychosocial assessment of the client and his or her family.
- Assemble and guide group discussions and decision-making sessions among relevant professionals and program representatives, clients and their families, 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 client 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 client.
- Provide support and information to help the client and his or her family in situations of crisis and conflict with service providers.
- Provide ongoing emotional support to the client and his or her family so they can cope better with problems and utilize professional and complex services.
- Complete the necessary paperwork to maintain documentation of client progress and adherence to the plan by all concerned.
- Act as a liaison between the client and his or her family and all relevant professionals, programs, and informal resources involved in the overall intervention plan to help the client make his or her preferences known and secure the services needed.
- Act as a liaison between programs, providing services to the client to ensure 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 clients.
- Secure and maintain the respect and support of those in positions of authority so their influence can be enlisted on behalf of clients, and used, when necessary, to encourage other individuals and agencies to participate in the coordination effort.
- Provide regularly scheduled in-home monitoring of assigned clients.

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- Remain current on state and federal policy, requirements, laws and regulations governing program and services.
- Perform other related duties as assigned.

Knowledge, Skills, & Abilities

- Ability to access and egress non-ADA facilities and homes.
- Knowledge of computer applications including Microsoft One Drive, Outlook, Excel, & Adobe.
- Knowledge of the dynamics of aging, grief and death.
- 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 client needs and development and implementation of corrective action(s) to resolve issues.
- Ability to communicate effectively, both orally and in writing, including public presentations.
- Ability to establish and maintain effective working relationships with agency staff, gatekeepers, and general public.
- Ability to analyze complicated situations efficiently and effectively.

Required Education or Experience:

Per Washington State Aging & Long-Term Support Administration Policy, **Case Managers** will meet at least the following minimum education and experience requirements:

- Master's degree in behavioral or health sciences and one year paid on-the-job social service experience; or
- Bachelor's degree in behavioral or health sciences and two years of paid on-the-job social service experience; or
- Bachelor's degree and four years of paid on-the-job social service experience; or
- Deemed Case Management Status from a Washington State Area Agency on Aging as described below; or
- Qualifications outlined for Case Manager Trainees are below when it has been demonstrated that applicants cannot be located who meet the education and experience requirements of 1, 2, or 3 above.

Individuals functioning as Case Managers prior to August 28, 1991 who have performed competently as determined by their performance evaluations may be deemed Case Managers when they meet the following educational requirements:

- High School diploma or its equivalent and four years of paid on-the-job social service experience prior to August 28, 1991; and
- Completion of state-sponsored CORE training.

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Case Manager Trainee Qualifications:

Experience without a bachelor's degree:

- High School diploma or its equivalent and one year paid full time on-the-job social service experience; or
- High School diploma and one year full-time equivalent verifiable hours through an internship or volunteer work in social services. Part-time hours may be considered if hours total one year full-time equivalent; and
- Appropriate bilingual or bicultural skills when relevant to the job demand.

OR

Bachelor's degree unrelated to behavioral and/or health sciences without relevant job experience:

- Bachelor's degree and appropriate bilingual or bicultural skills when relevant to the job demand.

The **Case Manager Trainee** will be deemed a **Case Manager** when all conditions below are satisfied:

- Participate in a two-year, on-the-job case manager training program under direct supervision; and
- Participate in a monthly supervisory review of a sample of client assessments and service plans; and
- Participate in annual performance evaluations conducted by the supervisor; and
- Perform competently as a case manager at the end of two years as determined by the supervisor's performance evaluation. Agency has the discretion to reduce the timeframe to one year for exceptional performance by the Case Manager Trainee as determined by the supervisor's performance evaluation.

Pay will depend on Case Manager or Case Manager Trainee (in Training for case manager) qualifications upon hire. Upon completion of Case Manager Trainee program pay will increase to Case Manager step level.

Required Certification and Licenses:

- Valid driver's license in state of residence.
- Auto insurance in the amount required by the State of Washington.
- Acceptable completion of a criminal history background check.

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 (up to 50 lbs.)
- Ability to uphold the stress of traveling.
- Regular, predictable attendance is required.

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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 (general responsibilities).