

**MARION SENIOR SERVICES**  
**Job Description**

<b>Position</b>	<b>Reports To</b>	<b>HR Use Only</b>
Case Manager	Community Care Director	
<b>Employee Name</b>	<b>Employee Signature</b>	<b>Date</b>

**Summary**

The Case Manager is responsible for providing case management services to elderly and/or disabled in order to prevent or delay institutional placement. Employee must have the ability to assess and document client's needs, develop care plans, secure needed services, maintain case records and provide ongoing assessment of changing needs and adequacy of services in compliance with program guidelines and regulations.

**Essential Duties**

The following statements describe the principal functions of this position and its scope of responsibility, but should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including working in other functional areas to cover absences or relief, to equalize peak work periods or balance the workload.

- Perform face-to-face initial in-home assessments, quarterly, semi-annual and required yearly reassessments for clients enrolled in the State, Federal, and Community Care Programs in order to review clients' needs and adequacy of delivered services.
- Develop client care plans based upon the needs as documented in the case record.
- Develop and maintain case record with all pertinent documents signed by the client, caregiver and the case manager including but not limited to: assessments, care plans, service costs calculation sheets, client choice of provider forms, consent forms, activity logs, grievance/complaint logs, narratives, CARES and DCFS forms.
- Arrange and authorize all services with the provider chosen by client/caregiver.
- Perform on-going monitoring of services to ensure that services are provided as authorized in the plan of care and document the client's satisfaction with all services provided regardless of the funding source.
- Perform monthly contacts with the client/caregiver to monitor services.
- Maintain on-going contact with the service provider(s) to ensure quality of services.
- Develop, update, and administer Monthly Case Load Program Reports with appropriate data and statistical analysis for end-of-month reports.
- Review and monitor case records to ensure compliance and data integrity with CIRTIS and program requirements.
- Refer client and/or caregiver to other programs or services based on client/caregivers needs, provide full coordination of services provided by various agencies, and ensure appropriate use of funding sources.
- Provide link between health care and social service delivery systems.
- Report any case of suspected abuse, neglect or exploitation of disabled and frail elderly clients to the Florida Abuse Hotline and perform face-to-face contact as mandated by State of Florida Law.
- This is a front-line position for providing excellent customer service to members of the general public and other employees. Customer service is provided in person or by phone contact.

**Essential Requirements**

- Considerable knowledge of the principles and practices of case management.

- Incumbents in this position must make all reasonable efforts to preserve the confidentiality and integrity of Protected Health Information and not to use or disclose more than the minimum amount of Protected Health Information necessary to accomplish the intended purpose of their
- Computer proficient in Word, Excel, Power Point, Outlook and Internet.
- Experience in outreach and knowledge of aging-related issues and available informal community resources.
- Knowledge of the methods, procedures, and techniques for conducting research, analyzing data and developing applicable reports.
- Ability to maintain effective working relationships with other employees and members of the general public.
- Ability to remain calm in stressful situations.
- Ability to take a teamwork approach to the job by cooperating with others, offering to help others when needed, and consider larger organization or team goals rather than individual concerns.
- Excellent customer service skills
- Ability to write narratives and reports for client's case record that conform to prescribed style and format.
- Ability to effectively present information to supervisor and management team
- Must have a high degree of accuracy in all assignment areas.

### **Supervisory duties**

- None

### **Education and Experience**

- Bachelor Degree in Social Work, Human Services, Psychology, Nursing, Gerontology or year-for-year related field experience or an equivalent combination of education and experience.

### **Licenses and Certifications**

- Valid Florida Class E Driver's License and Driving Record that meets company's insurance standards is required. Must have reliable transportation.
- Department of Elder Affairs Uniform Client Assessment and Care Planning Certification preferred. (This certification must be obtained within 6 months of starting position.)

### **Physical Requirements and Additional Skills**

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.

- Ability to read, analyze and interpret common program guidelines and procedures.
- Experience in interview and assessment activities.
- Walking, standing, sitting, stooping.
- Requires normal range of hearing, vision and manual dexterity to operate keyboard, telephone, photocopier, calculator and other office equipment as needed.
- Occasional stress from dealing with multiple demands

### **Work Environment**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job

- Office setting.
- Travel to designated locations as needed, must have reliable transportation. Frequent contact with staff and public.

Revised Date	Approved By (Manager):	Approved By (Human Resources):
10/01/2012	Jemith Rosa, CCE Dir.	Donna Tackett, HR Director
9/23/2016	Cassandra Jackson, CCE Director	Donna Tackett, HR Director
01/29/2024	Marisa Arbutina	Renee Cunningham, HR Director
07/26/2024	Leslie Henriquez	Renee Cunningham, HR Director