



CLASSIFICATION NO. 237

Established: 5/83

Revised: 2/94, 7/96

FLSA: Non-Exempt

EEO: 5

## **CASE MANAGER AIDE**

### **CLASS CHARACTERISTICS**

Under general supervision, to provide assistance to professional staff to ensure the provision of appropriate health and social services to clients; to serve as client advocate and liaison to service providers; and to do other work as required.

### **DISTINGUISHING CHARACTERISTICS**

The Case Manager series includes positions which provide assistance to disadvantaged members of the community, including low-income, disabled or elderly clients. Specific functions include comprehensive client needs assessments, service plan development and maintenance, client advocacy and liaison with service providers and other human service programs.

The Case Manager Aide provides administrative and paraprofessional assistance to professional staff. Incumbents perform limited casework, client advocacy and provider liaison duties and provide support in the administrative portion of case management. Positions at this level work under the direction of a Case Manager or other professional staff and receive training in the higher level duties related to case management.

The Case Manager Aide differs from the professional Case Manager which provides comprehensive case management services, and participates in program planning and service development.

### **TYPICAL TASKS**

Duties may include but are not limited to the following:

1. Screens client cases to determine assistance needed by clients; performs information and referral functions for other staff and clients to obtain services; provides limited technical assistance when appropriate.
2. Interviews clients, care givers, family members and other individuals in homes, hospitals and placement facilities; assesses the general well-being and personal and community support system of clients; reports to professional staff on the condition of clients and residences.
3. Prepares and maintains case records on clients and service providers; monitors client case files to ensure clients receive the comprehensive care and services established by the professional staff; verifies accuracy of information provided by clients, providers and other individuals associated with client cases.
4. Performs data entry of client assessments and payment documents; updates and maintains records as directed by professional staff; generates reports on client assessments and

payment levels.

5. Acts as liaison for clients and service providers; responds to questions and resolves problems with payments, services, case records and other technical and administrative issues.
6. Researches and investigates community resources and possible service providers; collects program data, prepares reports and evaluates information for special studies; participates in in-service training; provides casework consultation.
7. Manages a small caseload under general supervision; assesses clients; develops and reviews care plans; writes narratives for case files; updates computerized case records; fields client and provider inquiries; resolves client and provider problems.

### **REQUIRED KNOWLEDGE AND SKILLS**

Working knowledge of: Basic needs of individuals and families and factors which support their social and physical well-being such as health care, shelter, household management, material needs; techniques of evaluating appearance and conditions of clients, homes and care facilities; public social service program requirements, laws, rules and regulations applicable to assigned program; techniques of interviewing; office equipment, including personal computers and software programs.

Some knowledge of: Public and private social service agencies and community resources available for clients/providers of assigned program; methods and techniques used to support clients working toward self-sufficiency; problem behavioral patterns; principles and techniques of counseling; casework methods; basic medical terminology; office procedures, practices and equipment.

Skill to: Communicate effectively, both orally and in writing; interview applicants, clients and providers of social service programs; obtain information needed to determine the status of individual, family or provider problems; recognize symptoms of problem behavioral patterns; utilize departmental and community resources to assist clients attain basic social, health care, household management and material needs; obtain facts and discern relevant, significant information; establish and maintain effective working relationships with clients, the public, service providers, private agencies and County employees; perform arithmetic calculations to compute payments for client/program related expenses; prepare and maintain case records; apply concepts of cultural sensitivity; operate computer software and other office equipment.

### **WORKING CONDITIONS**

Some duties involve exposure to environmental factors and unpleasant living conditions and behaviors.

### **MINIMUM QUALIFICATIONS**

Minimum qualifications are used as a guide for establishing the minimum experience, education, licensure, and/or certifications required for employment in the classification. The following minimum qualifications are established for this classification. Additional minimum qualifications and special conditions may apply to a specific position within this classification and will be stated on the job announcement.

**Experience:** A minimum of one (1) year of related experience that would provide the required knowledge and skills to perform the responsibilities of this position.

**Licenses/Certifications:**

The following licensure/certifications are required at the time of hire.

- Positions within Health Centers must possess and maintain a Basic Life Support (BLS) certificate.

**PRE-EMPLOYMENT REQUIREMENTS**

Must successfully pass a criminal history check which may include national or state fingerprint records check.

Must pass a pre-employment drug test.

Driving may be necessary for County business. For position(s) with occasional/incidental driving, incumbents must possess a valid driver's license. Accommodation requests for an acceptable alternative method of transportation will be reviewed on an individual basis in compliance with State and Federal legislation. For position(s) with regular driving, incumbent(s) must also possess and maintain an acceptable driving record throughout the course of employment.

**OTHER INFORMATION**

The Case Manager Aide is a promotive classification. Incumbents may be promoted to open positions in the Case Manager classification. Possession of the required knowledge, skills and abilities must be documented through an approved promotional evaluation.

Edited: 11/18