



CLASSIFICATION NO. 239

Established: 3/83

Revised: 7/94

FLSA: Exempt

EEO: 2

CASE MANAGER, SENIOR

CLASS CHARACTERISTICS

Under direction, to lead the work of professional staff conducting comprehensive assessments of client needs and functional impairment; to determine the eligibility of applicants for a broad variety of public assistance and social services; to develop action plans to obtain needed support for clients; to participate in program planning, service evaluation and resource development; and to do other work as required.

DISTINGUISHING CHARACTERISTICS

The Case Manager, Senior provides assistance to clients who are economically disadvantaged, developmentally disabled, mentally and emotionally disturbed, alcohol and/or drug abusing, physically disabled and/or elderly. Incumbents develop case plans to match individual client needs, preferences and eligibility status with a broad range of financial, medical, social, vocational and other services and resources. The Case Manager, Senior also coordinates and oversees a work unit and participates in program planning and service development through committees, task forces and work groups.

The Case Manager, Senior differs from the Case Manager which does not have lead work responsibilities for a work unit.

TYPICAL TASKS

Duties may include but are not limited to the following:

1. Leads the work of staff in assigned work unit; trains and provides direction to Case Managers, Eligibility Specialists and related staff on complex technical or procedural issues; assigns caseloads and reviews decisions on difficult case problems; identifies training needs for work unit; assists in evaluating work performance; acts on behalf of the unit or program supervisor as directed.
2. Determines health care and social service needs of clients; interviews applicants, recipients, relatives, guardians, care providers and other involved parties; conducts comprehensive needs assessments, including psychosocial, financial and physical factors.
3. Develops and implements financial and service plans to meet specific requirements of clients; determines appropriate treatment, training and care services; matches client needs with potential providers; establishes payment levels based on client economic status, provider fees and federal, state and grant requirements.

4. Coordinates with health care providers, social service personnel and other agencies to obtain services; provides information and referral services to clients and families; reevaluates and updates case plans and client eligibility on a regular basis; advocates for client and other agencies for services.
5. Monitors client progress and ensures case plans are carried out; visits clients in homes, hospitals and residential care facilities; notes changes in mental/physical condition and deficiency in care being provided; reports and may investigate abuse and neglect complaints.
6. Develops and coordinates resources to provide clients and potential clients with needed services; develops support groups and volunteer programs; markets programs and recruits clients, service providers and volunteers; prepares grant applications and monitors grant funds; negotiates and monitors contracts with service providers.
7. Advocates for clients with family, providers, public and private agencies, law enforcement agencies, justice system, schools and others; provides information on client disability; responds to emergencies and negotiates resolution of problems.
8. Provides counseling, training and support to clients, families and providers in regard to placement and care/treatment plan choices, personal goals, daily living skills, financial planning, vocational and job readiness and medication management.
9. Writes case plan summaries; documents services provided to client; researches and compiles case statistics; develops, submits and modifies necessary documentation to implement payments and program benefits; prepares documentation for hearings.

REQUIRED KNOWLEDGE AND SKILLS

Thorough knowledge of: Methods and techniques of case management; social, health care, financial and other community resources and agencies; principles and techniques of interviewing, counseling and crisis intervention; laws, rules and regulations applicable to government programs and funding guidelines, including Title XIX; principles and techniques of human development and behavior in assigned area, such as geriatrics, physical disabilities, developmental disabilities, chronic mental illness, drug and alcohol abuse, or economically disadvantaged; office equipment, including personal computers and software programs.

Some knowledge of: Policies and procedures related to protective services, including client rights, hearings procedures and legal terminology; laws, rules and regulations applicable to involuntary commitment, protective services, guardianship, conservatorship, informed medical consent, confidentiality and facility certification and regulation; medical criteria for levels of care, disease processes and medical terminology; principles of management and organization design; principles and techniques of supervision.

Skill to: Plan and coordinate the work of assigned staff; direct staff in continuous efforts to improve quality, productivity and effectiveness; develop creative strategies to respond to unusual and complex case management problems and situations; gather information through research and interviews with applicants, clients, families, care providers and others; apply comprehensive social service evaluation and assessment methods; develop and implement appropriate case plans for clients with diverse needs and diverse settings; identify community/client needs and develop programs and resources to meet those needs; interpret

and apply federal, state and local laws, rules, regulations and policies; analyze relevant data and authorize expenditure of public funds in compliance with guidelines; compute payments for clients/program related expenses; maintain accurate and concise records; communicate effectively, both orally and in writing; establish and maintain effective working relationships with clients, families, care providers, community resources, other public and private agencies and County employees; operate computer software and other office equipment.

WORKING CONDITIONS

Some duties involve physical activity to assist clients in moving to new living accommodations and lifting, carrying or moving light household items. There may also be some exposure to environmental factors and unpleasant living conditions and behaviors.

Some positions require participation in 24 hour a day emergency services program.

MINIMUM REQUIREMENTS

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: Unless subject to program specific requirements outlined below, a minimum of three (3) years of related experience that would provide the required knowledge and skills to perform the responsibilities of this position.

- Positions within Developmental Disabilities (DD) must meet the minimum standards for a Service Coordinator under Community Developmental Disability Programs as defined in OAR 411.
- Some positions may require certification as a Qualified Mental Health Associate or other professional certification to meet qualification as mandated by Oregon Administrative Rules.

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 is required for County business on a regular basis or to accomplish work. Incumbents must possess a valid driver's license, and possess and maintain an acceptable driving record throughout the course of employment.

POST EMPLOYMENT REQUIREMENTS

Positions within the Behavioral Health Division must obtain a CPR/First Aid certificate within six (6) months of hire.

Edited: 3/24