

Jurisdictional Class: Competitive  
EEO Category: Professionals  
Revised: 01/15/2020

## **CASE MANAGER**

**DISTINGUISHING FEATURES OF THE CLASS:** This position involves responsibility to identify, assess and manage social problems relating to illness and disability allied with the receipt of long term medical care, and the attainment and maintenance of health by providing long term care services to patients and families having difficulty in social functioning. The incumbent develops and implements aging services care plans and makes referrals to other agencies, as appropriate. General supervision is received from a higher-level supervisor within the department. The incumbent performs related work as required.

### **TYPICAL WORK ACTIVITIES:** (Illustrative Only)

Provides aging and long term care services, where appropriate, to individuals and families receiving nursing or other services from the agency;

Prepares social histories to aid in determining the level of agency services;

Participates in agency case conferences identifying social problems; their severity and there interrelatedness to the medical situation, as well as, assessing the family's strengths and weaknesses, and discussing alternate methods of alleviating the situation;

Refers clients and families to community agencies;

Provides consultation to other staff members providing community based long term care services to clients and families receiving other services from the agency;

Receives referrals from other County departments, and makes initial response through telephone contact or home visit;

Assesses psychosocial and financial situation through telephone contact, during home visit and through family input;

Refers client to appropriate agencies and community services, and develops a plan of services;

Works with private, voluntary and other public agencies to identify the availability of medical, health-related and community services;

Maintains information on community and health resources; which can be utilized during clients' care and subsequent to discharge;

Records and evaluates psychosocial information to develop clients' case histories;

Maintains an advocacy role on behalf of clients to assure appropriate and timely care;

Participates in screening, assessment and re-assessment of clients and facilities transfer of clients from one service center to another or restructuring of client services;

Provides information and assistance to clients and their support network representatives on clients needs and options for the provision of services;

Provides on-going case management services to clients, and to their support networks to assure proper determination, delivery and utilization of services;

Participates with peers and supervisors in on-going assessment of the performance of long-term care system and of case management activities within the department;

Writes reports and completes necessary office work for assigned cases

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**FULL PERFORMANCE KNOWLEDGE, SKILLS, ABILITIES AND PERSONAL CHARACTERISTICS:**

Good knowledge of the practices and procedures of long term care and of the social and psychological factors related to diseases and disability; ability to counsel individuals and their families, who are being serviced by the agency; ability to function as a member of an interdisciplinary social services team; ability to prepare records and reports related to social service activities; and ability to utilize community resources effectively to meet individual and family social service needs; ability to confer with, and provide, social service consultations to other social services and health care professionals; sympathetic attitude toward the sick and disabled.

**MINIMUM QUALIFICATIONS:** Either:

- (A) Graduation from a regionally accredited or NYS registered college or university with a Bachelor's Degree in sociology, psychology, human services or resources, a health-related field, or a closely related field; **OR**
- (B) Graduation from a regionally accredited or NYS registered college or university with a Bachelor's Degree **AND** one (1) year of full-time paid human service\* experience; **OR**
- (C) Graduation from a regionally accredited or NYS registered college or university with an Associate's Degree **AND** three (3) years of full-time paid human service\* experience; **OR**
- (D) Graduation from high school or possession of a high school equivalency diploma **AND** five (5) years of full-time paid human service\* experience.

**\*Human service experience** is defined to mean experience which shall have involved a one-on-one interaction with a client, in order to actively facilitate the identification of client needs and goals through the interview process; as well as, the development of a service plan, (i.e.: identification and coordination of services available in the agency or the community to meet these needs and goals).

**SPECIAL REQUIREMENT:** Certain assignments made to employees in this case will require access to transportation to meet field work requirements in a timely and efficient manner.

**NOTE:** Verifiable part-time human service experience will be pro-rated toward meeting full-time experience requirements.

Title change from "Community Alternative Program Social Worker": 12/27/1999  
Title change from "Office of Continuing Care Program Social Worker": 06/30/2011

Adopted: 09/01/1987  
Revised: 08/29/1989; 10/13/1995; 01/16/1996; 09/24/1996; 12/27/1999;  
11/29/2001; 06/30/2011; 01/07/2016; 01/15/2020