

B&B Care Services, Inc.	<p align="center">Policies and Procedures</p> <p align="center">Title: EDWP Lead Case Manager</p> <p align="center">Section: EDWP</p>	<p>Policy Number: EDWP HR</p> <p>Origination Date: 07/2019</p> <p>Reviewed: 07/2020, 07/2021, 06/2022</p> <p>Effective Date: 12/2020</p>
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JOB DESCRIPTION AND PERFORMANCE EVALUATION

TITLE: LEAD CASE MANAGER FOR EDWP

EMPLOYEE: _____ **MANAGER:** _____

I. SUMMARY OF JOB

The Case Manager assists the family, caregivers and individuals either in the form of access or care coordination in circumstances where the person and/or the caregivers are experiencing diminished functional capacities, personal conditions, or other characteristics which require the provision of services by others.

Performs assessments of people needing services, their families and caregivers and assists in the development of support plans to address the identified needs.

Manages, under the direction and supervision of the Clinical Director/ Designee, the case management activities of the individual so that optimum quality and quantity of care is delivered efficiently and cost effectively in accordance with corporate policies, state and federal rules and regulations.

II. MAJOR AREAS OF RESPONSIBILITY

Code of Conduct

- Always works as a team player to provide quality client care, whether direct or indirect.
- Within scope of all applicable regulations and requirements, each employee will assist other team members in accomplishing their job duties in order to "get the job done".
- Holds self and team members accountable for knowledge of and full compliance with customer service performance standards.
- Customer is defined as individual receiving services, family, physician, visitor, fellow employee, volunteer, supplier and agency paying for the service.
- Participates in program planning and in the efficient, effective management of resources.
- Supports and participates in quality improvement activities.

Job - Specific Areas of Responsibility:

Supervises Case Management personnel and/or acts as the liaison between Case Management and the Clinical Director.

Supervisory duties:

- Interprets policy and procedure.
- Provides or arranges initial training and orientation to new Case Management personnel.
- Provides or arranges in-service training for Case Management personnel.
- Represents Case Management at network meetings and other interagency meetings as directed by the Clinical director of the case management agency.
- Serves as the contact person for lead agency staff, providers, Case Management and

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Department of Community Health

- Assures that case files and Case Management performances are reviewed as needed, or at a minimum that monthly supervisory staff conferences are held.
- May be assigned to monitor performance and prepare annual written performance evaluations of Case Management staff at the direction of the Clinical Director.
- Arranges and participates in case conferences.
- Maintains current and appropriate personnel/training records.

Public Relations Duties:

Collaborates with the lead agency in an assigned area to educate the general public, health and social service agencies, physicians and other health professionals, nursing homes, hospitals, health providers, church and civic groups, etc., regarding the services available, and establishes credibility within the community.

Administrative Duties:

- Assures that statistical data is accurate, compiled and submitted on a regular basis in conjunction with Case Management team members.
- Assists in development and revision of policies and procedures.
- Attends organizational meetings and training as required.
- Keeps supervisor informed of Traditional/ Enhanced EDWP progress and problems.

Other Duties:

- Attends hearings as requested, providing data and client records required by the hearing officer.
- Collaborates with social services Case Management in development of the Comprehensive Care Plan.
- Refers clients in need of protective services to appropriate agency: APS Central Intake Unit if they live at home; LTCO and Healthcare Facility Regulation (HFC) if they are residents of an ALS/PCH facility.
- Refers clients not appropriate for Traditional/ Enhanced EDWP assessment to other services.
- Refers clients on the waiting list to other community resources to meet their needs.
- May or may not maintain a caseload according to agency policy/practice. If client caseload is maintained refer to appropriate job description based on qualifications.
- Maintains an updated Case Management Manual and Provider Services Manual.
- Consults with Clinical Director regarding policy interpretation, admitting clients when program is full, difficult cases, and client referrals.
- Completes certification to establish baseline quality performance standards. Certification curriculum will include online module performance testing. Topics will include waiver eligibility and program options, quality management requirements, case management roles and responsibilities and person-centered planning. New hires must complete training within 60 days from the hire date.
- Attends required participation at quarterly ‘Train the Trainer’ meetings or participates in review of the meetings with supervisors.

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III. QUALIFICATIONS

Services are provided by an individual or under the supervision of an individual who has completed a course of study equivalent to a master 's degree in rehabilitation counseling, psychology, counseling, social work, vocational evaluation, special education or a closely related field, or who has a minimum of two years' experience in counseling, linking, with community resources, vocational evaluation and/or assessment.

- **Human Service Professional**
 - A human services professional with a bachelor 's degree in social work or a bachelor 's degree in a human services field other than social work (including the study of human behavior, human development or basic human care needs) and with specialized training or one year of experience in working with persons with mental retardation.
- **Educator**
 - An educator with a degree in education from an accredited program and with specialized training or one year of experience in working with persons with mental retardation.
- **Registered Nurse**
 - A licensed registered nurse that has specialized training or one year of experience in working with persons with mental retardation.
- Has never issued false statements to a state or federal official.

Experience

Minimum of one year experience in case management or a related field dealing with individuals who are aging or a Master's Degree in the field of Health Science.

Other Requirements:

Valid driver's license, proof of liability insurance, and reliable transportation.
Satisfactory completion of background check as required by State Regulations.

Knowledge, Skills, Abilities

Demonstrated level of interpersonal skills necessary to communicate with individuals receiving services, referral sources, staff, and contract representatives.

Demonstrated ability to analyze needs and to initiate and fulfill services to people.

Advanced knowledge and skill in problem solving and trouble shooting.

Demonstrated leadership/management expertise in relation to program implementation and evaluation.

Advanced level of independent judgment.

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IV. PHYSICAL REQUIREMENTS

A. WORKING CONDITIONS

Works in climate-controlled office or remotely. Has the potential for being outside or in homes that are not climate controlled. Potential for heavy workloads with deadlines. At times can be stressful.

B. PHYSICAL DEMANDS

Prolonged sitting may be required.
Prolonged use of computer may be required with intense visual concentration.
Operates motor vehicle as required, with long range travel rarely.
Requires lifting and handling of office products up to 50 pounds.
Vision corrected or adapted to be able to perform duties.
Requires hearing corrected or adapted to be able to communicate effectively.
Mobility required, but can rest at will.

I have read and understand the job description for Case Manager and am able to perform the essential functions of the position.

Signature

Date

Administrator or Designee

Date

Employee comments:

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Name: _____ Date of Hire: _____ Evaluation Date: _____

Performance Appraisal

I certify that my supervisor has reviewed my performance appraisal results with me. My signature does not necessarily indicate that I agree with the appraisal results.

Employee's Signature

Date

Supervisor's Signature

Date

Performance Summary

(Note: A plan to correct the behavior must accompany appraisal for 2 or more below expected ratings, for ratings of 1 or 3 the evaluator must include a brief explanation to support the below of above expected level of performance ratings.)

Overall Average Rating: _____ Standard with the ratings of 3:

Please identify what Goal the Company needs to implement for this person:

Goal:

Please identify the Personal and Professional Goals of the Employee:

Personal Goal:

Professional Goal: