Case Manager

CLASS TITLE	CLASS CODE	SALARY GROUP	SALARY RANGE
CASE MANAGER I	5226	B13	$35,439 - $52,388
CASE MANAGER II	5227	B15	$38,976 - $58,045
CASE MANAGER III	5228	B17	$42,976 - $64,469
CASE MANAGER IV	5229	B19	$48,244 - $76,028
CASE MANAGER V	5230	B21	$54,278 - $87,046

GENERAL DESCRIPTION

Performs case management work involving developing and maintaining long-term contact with clients, client families, and service providers for medical, social, educational, and related service needs.

EXAMPLES OF WORK PERFORMED

Interviews and screens clients or authorized representatives to gather information to assess service needs.

Develops and implements service and treatment plans to meet clients' needs.

Coordinates service provider and program activities.

Provides ongoing case management and serves as a liaison between clients, client families, and service providers.

Identifies problem areas and service gaps.

Maintains case history and progress records and prepares reports and evaluations.

Performs related work as assigned.

DESCRIPTION OF LEVELS

Examples of work and descriptions are meant to progress through the levels. For example, an employee at level V may also perform work listed within the previous levels.

***Note**: Factors that may distinguish between the journey levels include the degree of independence in performing the work; the complexity of the work; the scope of responsibility; and the employee's related experience, education, and certifications. Employees at the journey levels may independently perform the full range of work identified within current or previous levels and may assist others in performing work of greater complexity.*

CASE MANAGER I: Performs routine (journey-level) case management work. Works under moderate supervision, with limited latitude for the use of initiative and independent judgment. Employees at this level may rely on direction from others to solve problems that are not standard. Employees may also occasionally assist others in performing job duties of greater complexity.

CASE MANAGER II: Provides moderately complex (journey-level) case management work. Works under general supervision, with moderate latitude for the use of initiative and independent judgment. Employees at this level may:

- Identify areas that are barriers to services for clients.
- Make recommendations on policy and procedure changes.
- Monitor clients' progress.
- Perform transition planning to ensure continuity of care and management of risk factors.

Note: *A senior-level employee (levels III-V) may serve in a lead or supervisor role; however, typically, supervisory responsibilities within this job classification series will be found at level IV or V, depending on the structure and size of the supervised workgroup.*

A senior-level employee may perform the full range of work identified in the levels preceding their own, and/or may coordinate and/or oversee that work for others. Factors that may distinguish between senior levels include the scope of responsibility, oversight, and authority; and the nature, complexity, and impact of the work performed.

CASE MANAGER III: Performs highly complex (senior-level) case management work. Works under limited supervision, with considerable latitude for the use of initiative and independent judgment. Employees at this level may:

- Review clients referred to case management and track progress through the case management intake and screening process.
- Participate in the quality assurance and utilization review processes for case management to ensure quality services.
- Prepare reports on service provider and program activities.
- Develop presentations and orientations.

CASE MANAGER IV: Performs advanced (senior-level) case management work. Works under minimal supervision, with extensive latitude for the use of initiative and independent judgment. Employees at this level may:

- Develop program goals, objectives, policies, and procedures.
- Monitor and evaluate service delivery systems and clients' progress.
- Monitor case management and program budgets.
- Instruct staff of current methods, standards, and trends in case management.

CASE MANAGER V: Performs highly advanced (senior-level) case management work. Works under minimal supervision, with extensive latitude for the use of initiative and independent judgment. Employees at this level may be considered technical experts or oversee, evaluate, and implement improvements to case management and program activities, and may:

- Coordinate and develop intra-agency or interagency agreements to address community service gaps and barriers.

GENERAL QUALIFICATION GUIDELINES

EXPERIENCE AND EDUCATION

Agencies have the discretion to identify the general or specialized experience, education, or certifications required for positions and may tailor qualification requirements to specifically meet the agency's business needs. Agencies may substitute experience, education, military service, apprenticeships, and relevant credentials for one another, if appropriate and allowed by statute.

KNOWLEDGE, SKILLS, AND ABILITIES

For all levels

- Knowledge of community resources; case management principles, objectives, standards, and methods; and program policies and procedures.
- Skill in developing, implementing, and monitoring service and treatment plans.
- Ability to assess clients' needs, to coordinate clients' services, to communicate effectively, and to provide guidance to others.

Additional for Case Manager III – V levels

- Ability to monitor program effectiveness and to oversee and/or supervise the work of others.

Additional for Case Manager IV-V levels

- Ability to evaluate clients' services.