

**Lane Council of Governments
Job Classification**

Job Title: Lead Case Manager
Division: Senior & Disabled Services
Reports To: Program Supervisor

FLSA Status: Exempt
Range: 16
Last Revised: March 2008

General Statement of Duties

Provides training, consultation, and problem solving assistance to Case Managers. Assists Program Supervisors with oversight of billings, quality assurance, and other non-personnel related duties. Incumbent is expected to exercise knowledgeable, independent judgment on routine and non-routine matters.

Supervision Received

Work is performed under general supervision and work performance is evaluated through periodic checks and through the adequacy and timeliness of products and services provided and results observed.

Supervision Exercised

None.

Resource Responsibility

Moderate responsibility for monetary or human resources. Includes final decisions or recommendations regarding correct use of resources with only general checks for reasonableness of actions. Decisions made within policy guidelines.

Distinguishing Features

Positions assigned to the Lead Case Manager classification are distinguished from the Case Manager Range 13 and 15 by duties that include training, consultation and quality assurance activities. These activities require a comprehensive understanding of complex program rules, regulations and standards, and the ability to analyze unique situations.

Essential Job Functions

Consults with Case Managers on difficult cases and provides a second opinion, expertise and problem solving assistance. Provides leadership and policy interpretation to the unit as directed.

Researches policy and keeps up to date on changes and technical advances.

Trains staff on current or new policy in a group setting or on a one-on-one basis.

Creates, compiles, and updates effective tools for Case Managers to use, i.e. cheat sheets.

Analyzes and approves provider billings (i.e. ADDUS, Adult Day Care). Works with Case Managers to reconcile discrepancies.

Reviews cases that transfer in from other counties. Functions as the contact person for other SPD agencies to discuss transfer-ins.

Offers operational and technical assistance to Program Supervisors, i.e. following up with Case Managers regarding late pay-ins, EPD cost shares, Contract RN program utilization review, etc.

Under the supervision of the Program Supervisors, participates in Quality Assurance activities, including file reviews.

Participates in the Policy Review Committee and maintains the minutes.

May complete intakes or re-determinations of both financial and functional eligibility.

Provides thorough explanation of services, policies and assistance available; performs comprehensive assessment of client functioning, resources and needs; assesses client's ability to perform daily living activities, medical issues and needs and develops a care plan.

Determines financial eligibility for Medicaid and/or food stamp programs; reviews appropriate financial information such as income, bank statements, tax records and life and health insurance policies; interprets administrative rules regarding food stamp and Medicaid eligibility, Oregon Health Plan, QMB and Oregon Project Independence.

Ensures that all necessary forms are fully completed, signed and dated; provides explanation of applicant's rights and responsibilities.

Contacts service providers to initiate a care plan and negotiates payment for services provided.

Provides on-going case management, resolving problems until plan is stable.

Verifies all financial information stated on food stamp and/or Medicaid application. Completes and routes all necessary authorizations for state payment to in-home providers, foster homes and nursing homes.

Enters client's psychosocial assessment into state computer system; provides complete description of client's functional status and care plan.

Prepares a variety of records and reports as directed by Program Supervisors.

Other Job Functions

Provides back-up support to other positions and the office in case of absence or work overload.

Performs other related duties as assigned.

Working Conditions

The work is performed primarily indoors requiring hand/eye coordination in the operation of office equipment. Work involves some travel to make home visits with potential exposure to animals, diseases, unsanitary conditions, and traffic hazards.

Knowledge, Skills, and Abilities

Thorough knowledge of legal requirements, standards, regulations, policies and procedures related to programs for senior citizens and people with disabilities.

Thorough knowledge of client assessment techniques and service plan development.

Considerable knowledge of issues, problems, and concerns of clients.

Considerable knowledge of community resources and services for the elderly and disabled people.

Ability to explain complex programs, rules, regulations and policies to clients and their families.

Ability to develop service plans for the care and safety of elderly clients.

Ability to communicate effectively with other employees, clients, representatives of other agencies and the general public using tact, courtesy and good judgment.

Ability to prepare reports and maintain accurate, up-to-date records.

Ability to work with accuracy and attention to detail to meet deadlines.

Ability to understand and execute oral and written instructions, policies and procedures.

Ability to operate standard office equipment such as typewriter, computer terminal, word processor, transcriber, calculator and photocopier.

Ability to establish and maintain effective working relationships with employees, senior citizens, other agencies, and the general public.

Ability to physically perform assigned duties.

Education and Experience

Bachelor's Degree in social work and six years of progressively more responsible experience working in human service programs, preferable within our agency or DHS, or any combination of education and experience that provide the applicant with the knowledge, skills, and ability to perform the job.

Licenses, Certificates, and Other Requirements

Valid Oregon State driver's license or the ability to obtain reliable transportation to various sites within Lane County.