

Case Management Job Task Analysis – Revised June 2011 – Effective January 1, 2012

Engagement – Process through which the case manager builds rapport with and elicits commitment from the client or potential client.

Knowledge of:

1. Communication techniques.
2. Treatment and other resources.
3. Interviewing techniques.
4. Building and maintaining working relationships with clients.
5. Cultural differences and lifestyles.
6. Client rights and responsibilities.

Skill in:

1. Evaluating the client's understanding of the program orientation.
2. Building rapport and trust.
3. Problem solving and listening.
4. Communicating availability of appropriate resources.
5. Communicating respect and acceptance of cultural and lifestyle differences.
6. Identifying client's strengths and opportunities.
7. Motivational techniques necessary to bolster the client's awareness of strengths and personal commitment to pursue opportunities.

Evaluation - Process of gathering information regarding the client's substance use and overall well-being in order to determine a plan for services/supports.

Knowledge of:

1. Substance use/abuse/dependence.
2. DSM Criteria for substance abuse/dependency.
3. Co-Occurring disorders.
4. Pharmacology.
5. Interviewing and assessment techniques.
6. Health and prenatal/perinatal needs.
7. Risk factors that relate to potential suicide, homicide, family violence, self-injury, and other violent and aggressive behaviors.
8. Procedures associated with overdose and acute withdrawal, acute medical and psychiatric implications.
9. Diversity related to client needs.
10. Oral and written communication.
11. Planning and coordination of services.
12. Case management functions.

Skill in:

1. Recognizing signs and symptoms of substance use/abuse/dependence.
2. Identifying behavior patterns associated with the process of addiction and co-occurring disorders.
3. Identifying, interpreting, integrating, and prioritizing client data.
4. Using evaluation tools.
5. Assessing and matching client's needs with resources.

6. Helping clients determine solutions, resolve issues, and pursue opportunities.
7. Communicating respect and acceptance of cultural and lifestyle differences.
8. Oral and written communication.

Coordination of Resources – Process of identifying, referring, linking, and monitoring services throughout the continuum of care.

Knowledge of:

1. Service providers and community resources.
2. Procedures for monitoring client progress.
3. Advocacy and linking practices.
4. Continuing care review practices.
5. Establishing and maintaining working relationships with other professionals.
6. Oral and written communication.
7. Documentation and record keeping procedures.
8. Referral and follow-up procedures.
9. Payment options, fees, and/or insurance.

Skill in:

1. Accessing, collecting, summarizing, and transmitting referral data on client.
2. Negotiating with diverse systems.
3. Identifying and linking with appropriate resources.
4. Soliciting and interpreting client feedback.
5. Interdisciplinary team building.
6. Applying level of care criteria.
7. Ongoing interpretation of data.
8. Seeking and responding to information from other professionals.
9. Preparing documentation completely and accurately.

Referral/Placement – Process of matching assessed needs of the client with the appropriate level of care and type of service.

Knowledge of:

1. Necessary referral information and processes.
2. Levels of care and ancillary resources.
3. Client's eligibility for service.
4. Service provider's strengths, limitations, and philosophies.
5. Natural supports and alternate resources.

Skill in:

1. Networking and collaborating.
2. Matching client's needs with resources.
3. Presenting rationale for client referral.
4. Communicating the importance of following service recommendations.

Professional Responsibility – The process of enhancing personal and professional wellness through a variety of tools.

Knowledge of:

1. Federal and State confidentiality laws.
2. Code of Ethical Conduct.
3. Professional Scope of Practice.
4. Collaborating with supervisors, peers, and other service providers.
5. Agency policy and procedures.
6. Personal strengths and limitations.
7. Cultural diversity.

Skill in:

1. Adhering to ethical guidelines.
2. Adhering to Federal/State laws and regulations.
3. Recognizing and respecting client diversity.
4. Conducting personal and professional self-evaluations.
5. Recognizing and addressing the need for continuing education.
6. Participating in supervision/consultation.
7. Practicing personal wellness.
8. Recognizing and addressing personal biases.