

Jurisdictional Class: Competitive
Adopted: March 12, 1992
Revised: August 8, 2019

CASE MANAGER FOR ELDERLY SERVICES

DISTINGUISHING FEATURES OF THE CLASS: This position involves responsibility for coordinating and monitoring the provision of social services to individuals to assist them with their economic, emotional, social, and environmental difficulties. The incumbent develops and reassesses a service plan, which will allow clients to live at home rather than in an institutional setting. The work is performed under the general supervision of the Coordinator of Aging Services or the Director. The incumbent does related work as required.

TYPICAL WORK ACTIVITIES: (Illustrative only)

Makes home visits to screen prospective clients and gather information on services needed;
Works with the client and his/her family to set up needed services and authorizes these services;
Maintains case records on clients including service plan, case notes, and monitoring reports;
Works with provider, health aide, human and social services agencies to identify types of services available and to ensure timely services;
Works closely with staff in carrying out the plan for services, and maintains liaison and works collaboratively with community agencies to which individuals and families can be referred for services;
Periodically reviews and monitors services to clients to determine changes in the individual's or family's situation to ensure needs are being met;
Keeps abreast of current trends in long-term care, attends related conferences, seminars, etc;
Monitors and maintains an ongoing tracking process to ensure that program activities and expenditures are implemented according to plan;
Prepares a variety of records and reports related to the work.

FULL PERFORMANCE KNOWLEDGE, SKILLS, ABILITIES & PERSONAL CHARACTERISTICS:

Good knowledge of the characteristics, needs, and interests of the elderly;
Good knowledge of community agencies, facilities, and services, which can be utilized to aid the elderly;
Ability to make accurate assessment of social, emotional, physical, and financial needs of elderly clients using prescribed procedures;
Ability to establish working relationships with the elderly and staff in community human services agencies;
Ability to communicate effectively, both orally and in writing;

MINIMUM QUALIFICATIONS: Either:

(a) Graduation from a regionally accredited or New York State registered college or university with a Bachelor's Degree in Social Work, Behavioral Sciences, Human Services, Health Education, Nursing, or closely related field; or

(b) Graduation from a regionally accredited or New York State registered college or university with a Bachelor's Degree and one (1) year of experience working with the elderly, or community services, social services, nursing, or case management services; or

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- (c) Graduation from a regionally accredited or New York State registered college or university with an Associate's Degree in Social Work, Behavioral Sciences, Human Services, Health Education, Nursing, or closely related field and three (3) years of experience working with the elderly, or community services, social services, nursing, or case management services; or
- (d) An equivalent combination of training and experience as defined by the limits of (a), (b), and (c) above.

SPECIAL REQUIREMENT: Assignments made to employees in this class will require reasonable access to transportation to meet fieldwork requirements in the ordinary course of business in a timely and efficient manner.