Cottage Health System Job Description

POSITION TITLE: Case Manager - Post Acute  
Job Code #: 5041

Date Created: 09/2007  
Date(s) Revised: 03/2009

HR Approved by: D. Patelzick  
Date Approved: 6/10/09

COTTAGE HEALTH SYSTEM EXPECTATIONS

♦ VALUES
   Essential to our mission and vision are the core values that form the foundation of who we are: Excellence, Integrity, Compassion.

♦ SHARED GOVERNANCE
   CHS operates under a system of accountability that establishes a positive staff/management partnership leading to a meaningful, respectful and creative work environment dedicated to meeting the healthcare needs of all served.

♦ JOURNEY TO EXCELLENCE
   The Cottage Experience involves a focus on service excellence as a core component of the CHS mission to provide high quality, affordable healthcare to the communities served.

♦ CODE OF CONDUCT
   Employees are expected to hold themselves and others accountable for the Code of Conduct, in order to manifest an environment of mutual respect, civility, and dedication to positive personal relationships that enhances personal growth and job satisfaction and which thereby supports the mission, vision, and values of CHS.

♦ CONFIDENTIALITY
   As set forth in the Health Insurance Portability and Accountability Act of 1996 (HIPAA), employees are required to maintain patient confidentiality in accordance with State and Federal regulations. In addition to patient information, the confidentiality of financial, systems, and staff information is also to be maintained.

SUPERVISES THE FOLLOWING POSITIONS (if applicable):

STATUS: X Nonexempt

JOB PURPOSE

The post acute case manager is responsible for utilization review, utilization management, quality assurance and discharge planning for all persons served. Additionally, the post-acute case manager is the central point of coordination of the rehabilitation program from admission to discharge. Additionally, case managers will champion, engage, manage and monitor proactive communications and interventions by and between relevant stakeholders with regard to care management.
Case management will work collaboratively and proactively with the medical staff/nursing staff/other disciplines to support and achieve the goals of the collaborative care process. Case managers will maintain a working knowledge of regulations and provider contracts governing coverage of inpatient services (i.e., Medicare, Medi-Cal, California Children Services, Genetically Handicapped People Program, Contracted Medical Groups). They will maintain and model interpersonal skills and productive relationships that allow for and support effective interaction with a wide variety of stakeholders. Case managers will consistently demonstrate professionalism and compassion with regard to human dignity, preserving and protecting client autonomy and rights and with respect for patient/family values and beliefs.

Case management activities will result in quality outcomes, optimal care/cost management of services and/or procedures, a high level of customer satisfaction, and contribution to an overall value-oriented experience of stakeholders and persons served.

### MAJOR ACCOUNTABILITIES / SPECIFIC JOB COMPETENCIES

This is not an exhaustive statement of duties, responsibilities, or requirements. Employees will be required to perform any job, with related instruction given by their supervisor, subject to reasonable accommodation.

1. **Utilization Review:** Independently performs concurrent review on all assigned patients applying CMS, InterQual criteria and/or other evidence-based guidelines for severity of illness and intensity of service along with all other appropriate and pertinent data/information to ensure formation and engagement of an appropriate care management plan. Discusses cases as appropriate with relevant stakeholders (such as patient, physicians, other providers and payers) to best align care management plan, level of care and funding resources. Acts as facilitator and contributor to weekly team conferences, offering direction, input and guidance as appropriate for utilization management and determinations for continued stay/programming. Maintains timely and accurate records of all activities relating to the case management process, documenting activities as appropriate.

   Percentage of time: **25 %**

2. **Resource Management:** Understands the principles of reimbursement and the procurement of services within the reimbursement parameters. Ascertains healthcare benefits utilizing both internal and external resources as appropriate to coordinate necessary and appropriate care, while appropriately preserving the healthcare benefits of the beneficiary. Identifies and refers situations requiring immediate intervention to the attending physician, risk management, department director and/or physician advisor as appropriate. Refers cases not meeting criteria (including situations involving the timely provision of services) to the transdisciplinary team, attending physicians, medical director and/or department director as appropriate. Maintains accurate and thorough documentation of activities, to include those mandated by third party payers.

   Percentage of time: **25 %**
3. **Discharge Planning:** On admission, initiates the coordination and development of a discharge plan. In conjunction with the transdisciplinary team, patient and family stakeholders identifies likely post-discharge needs. Provides appropriate information, education and choice, making referrals as appropriate to implement the discharge plan (such as community resources, home healthcare, institutional placements, financial assistance, equipment needs and/or alternative/specialized care settings). Facilitates the transfer of patients to other care facilities as appropriate. Maintains accurate and thorough documentation of activities, to include those mandated by third party payers.

Percentage of time: 25%

4. **Quality Assurance:** Participates in the improvement of organizational performance through quality assurance and performance improvement activities. Participates in the tools, measurement and continuous improvement of quality, productivity, value and efficacy of case management functions. Supports system-wide development, analysis and implementation of process improvement initiatives. Reports suspected and/or emerging patterns and trends. Participates in the denial/appeal process as appropriate, and cooperates fully in all risk management activities and investigations.

Percentage of time: 10%

5. **Education:** As appropriate, educates the patient/family to the care delivery process: provision of services, healthcare providers and resources, issues related to funding, and areas of patient choice and accountability. Explains the plan of care and treatments within the context of the patient’s/family’s values, and in a language understood by the patient/family. As appropriate, assists in coordinating an educational plan with the interdisciplinary healthcare team.

Percentage of time: 05%

6. **Leadership & Collaboration:** Provides consultation, support and ongoing education as needed to help promote and manage a value-oriented experience for persons served. Serves as a consultant for case management issues and as coach/mentor to others. Participates in care planning activities, rounds, committee meetings and other activities as appropriate. Demonstrates a continuing effort to improve the quality of his/her performance to better the organization (such as continuing education/professional development and/or through participation/membership with appropriate professional organizations).

Percentage of time: 10%

**LOCATION SPECIFIC ACCOUNTABILITIES (if applicable)**

- Goleta Valley Cottage Hospital:
- Santa Barbara Cottage Hospital: X
- Cottage Rehabilitation Hospital:
- Santa Ynez Valley Cottage Hospital: ____________________________

**SCHEDULES**

With variations due to hospital site and department, this position may require census-driven scheduling flexibility (additional/fewer shifts), holiday coverage, floating, being placed on-call, weekend coverage, and shift rotations.
QUALIFICATIONS
All job qualifications listed indicate the minimum level necessary to perform this job proficiently.

LEVEL OF EDUCATION
Minimum: Graduate of an approved training program with associates degree (ADN), bachelors’ degree (BSW, OT, TRT) or master's degree (MSW, PT, SLP).
Preferred: Master’s degree (PT, OT, SLP, MSW, MSN); Bachelor’s degree in nursing (BSN).

CERTIFICATIONS, LICENSES, REGISTRATIONS
Minimum: California license or appropriate national certification in one of the disciplines related to acute medical rehabilitation programming: RN, PT, OT, SLP, TRT. License or certification is not required for BSW or MSW.
Preferred: Certification in Case Management (CCM).

TECHNICAL REQUIREMENTS
Minimum: Must be able to: demonstrate an understanding of criteria for acute inpatient medical rehabilitation programming; assess discharge planning needs of a diverse population, and provide appropriate age specific case management services to patients assigned. Must be able to exercise independent discretion and judgment, and act at all times with the highest degree of professionalism and objectivity. Must be able to manage basic online and support functions for assigned activities.
Preferred:

YEARS OF RELATED WORK EXPERIENCE
Minimum: Minimum 2 years experience in medical rehabilitation services or case management.
Preferred:

KNOWLEDGE, SKILLS, and ABILITIES
All knowledge, skills, and abilities listed indicate the minimum level deemed necessary to perform this job proficiently.

PROBLEM SOLVING AND DECISION MAKING
Excellent organizational and analytical skills required. Able to make independent decisions and utilize effective problem solving models and methods. Able to understand and leverage all continuum of care options.

COMMUNICATION SKILLS
The employee communicates effectively.
Continuously demonstrates clear, objective and professional communication at all times. Actively pursues and ensures both appropriate oral and written communication regarding case management functions, activities and responsibilities.

OTHER

Working knowledge of regulations and provider contracts governing coverage of inpatient services (i.e., Medicare, Medi-Cal, California Children Services, Genetically Handicapped People Program, Contracted Medical Groups).

SCOPE OF CARE AND AGE RELATED COMPETENCY – To be completed for clinical positions only

Staff members must demonstrate the knowledge and skills necessary to provide care based on the patient population. Care, as defined in the department Scope of Care, is based on physical, psycho/social, educational, safety and related patient needs, appropriate to the age of the patients served in the assigned area(s). The skills and knowledge needed to provide such care may be gained through education, training, or experience. Knowledge and skills needed include: knowledge of human growth and development; ability to assess age specific data; ability to provide age specific care; ability to interpret age specific response to treatment; ability to involve family or significant other in decision-making related to plan of care.

TO BE COMPLETED WITH EMPLOYEE:

BASED ON SCOPE OF SERVICE

<table>
<thead>
<tr>
<th>Neonatal (0 - 28 days)</th>
<th>Geriatric</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infant (28 days - 1 year)</td>
<td>Medical Staff</td>
</tr>
<tr>
<td>Pediatric</td>
<td>Employees (Staff/Mgt)</td>
</tr>
<tr>
<td>Adolescent</td>
<td>Family/Visitors</td>
</tr>
<tr>
<td>Adult</td>
<td>Other (describe below)</td>
</tr>
</tbody>
</table>

I acknowledge receipt of this job description, and I am responsible for discussing any related questions with my supervisor. This document in no way states or implies that these are the only duties to be performed by the employee occupying this position.

__________________________________________  ____________________________  ________________
Employee Signature                             EE#                                      Date
PHYSICAL JOB DEMANDS

JOB TITLE – Patient Care/Patient Contact

(Examples: Respiratory Therapist, Radiology Technician, RN, CNA)

The physical job demands are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Frequency Code: The following abbreviations denote the frequency an activity is performed daily.

- N = Never (0 hours)
- O = Occasionally (>0 hours and <3 hours)
- F = Frequently (>3 hours and <5 hours)
- C = Continuously (>5 hours)

<table>
<thead>
<tr>
<th>Physical Demands</th>
<th>Code</th>
<th>Code</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sitting</td>
<td>F</td>
<td>Crawling</td>
<td>N</td>
</tr>
<tr>
<td>Standing</td>
<td>F</td>
<td>Balancing</td>
<td>O</td>
</tr>
<tr>
<td>Walking</td>
<td>F</td>
<td>Pushing &gt;10 lbs</td>
<td>O</td>
</tr>
<tr>
<td>Bending</td>
<td>O</td>
<td>Pulling &gt;10 lbs</td>
<td>O</td>
</tr>
<tr>
<td>Stooping</td>
<td>O</td>
<td>Lifting &gt; 10 lbs</td>
<td>O</td>
</tr>
<tr>
<td>Squatting</td>
<td>O</td>
<td>Bilateral Hands - dexterity</td>
<td>F</td>
</tr>
<tr>
<td>Kneeling</td>
<td>O</td>
<td>Touch/palpation</td>
<td>O</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Object Manipulation</th>
<th>Code</th>
<th>Examples of materials handled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fine Manipulation</td>
<td>F</td>
<td>e.g., writing, typing, administering medication, label specimens</td>
</tr>
<tr>
<td>Simple Grasp</td>
<td>F</td>
<td>e.g., opening an IV bag, BP cuff application, emptying a foley catheter bag</td>
</tr>
<tr>
<td>Firm Grasp</td>
<td>O</td>
<td>e.g., holding a drawsheet, linen bags, patients</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Lifting</th>
<th>Weight - Pounds</th>
<th>Below Waist</th>
<th>Waist/ Chest</th>
<th>Above Shoulder</th>
<th>Examples of Objects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 10</td>
<td>O O O</td>
<td>Foley catheter bag, chart, IV bag</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-25</td>
<td>O O O</td>
<td>Push &amp; turn a wheelchair, box of supplies</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>26-50</td>
<td>O N N</td>
<td>Full linen bag, assist patient from supine to sitting</td>
<td></td>
<td></td>
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<tr>
<td>51-75</td>
<td>N N N</td>
<td>Manually lifting or moving a person with assist</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>76-100</td>
<td>N N N</td>
<td>Manually lifting or moving a person with assist</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Over 100</td>
<td>N N N</td>
<td>Manually lifting or moving a person with assist</td>
<td></td>
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</tbody>
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May be exposed to the following conditions:

Environmental Conditions
Fumes/odors, radiation (x-ray, radioactive isotopes), mechanical hazards, electrical hazards, slippery surfaces, biohazard exposure, rotating shift assignments, travel to other CHS facilities

Safety equipment/attire
Gloves, goggles, masks, N 95 respirators, face shields, hand hygiene products