## RN-Case Manager

<table>
<thead>
<tr>
<th>First Name</th>
<th>xxxxx</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>xxxxx</td>
</tr>
<tr>
<td>Job Code</td>
<td>8790608</td>
</tr>
<tr>
<td>Job Title</td>
<td>xxxxx</td>
</tr>
<tr>
<td>Cost Center</td>
<td>8790</td>
</tr>
<tr>
<td>Department Name</td>
<td>xxxxx</td>
</tr>
<tr>
<td>Reports To</td>
<td>xxxxx</td>
</tr>
<tr>
<td>Hire Date</td>
<td>xxxxx</td>
</tr>
<tr>
<td>Merit Effective Date</td>
<td>xxxxx</td>
</tr>
<tr>
<td>Annual Competency Fair</td>
<td>xxxxx</td>
</tr>
<tr>
<td>Unit Specific Competency</td>
<td>xxxxx</td>
</tr>
<tr>
<td>Hourly Rate</td>
<td>xxxxx</td>
</tr>
<tr>
<td>Disciplinary Action</td>
<td>xxxxx</td>
</tr>
<tr>
<td>Min Grade</td>
<td>xxxxx</td>
</tr>
<tr>
<td>Max Grade</td>
<td>xxxxx</td>
</tr>
<tr>
<td>Annual Employee Exam</td>
<td>xxxxx</td>
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</tbody>
</table>

### Template Used: Nursing Template

**KDHCD MISSION STATEMENT**

To provide safe, high-quality, customer-oriented, and financially strong healthcare services that meet the diverse needs of those we serve.

**NURSING VISION STATEMENT**

Professional nurses dedicated to providing patient-centered care with compassion.

**POSITION SUMMARY/PURPOSE**

The RN Case Manager assesses plans, coordinates care, evaluates and advocates for services to meet patients health needs as they move through the continuum of care to promote quality and cost effective outcomes.

### QUALIFICATIONS

<table>
<thead>
<tr>
<th>License / Certification</th>
<th>Required:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>California RN license</td>
</tr>
<tr>
<td></td>
<td>BLS</td>
</tr>
<tr>
<td>Preferred:</td>
<td>N/A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Education</th>
<th>Required:</th>
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<tbody>
<tr>
<td></td>
<td>N/A</td>
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</table>

<table>
<thead>
<tr>
<th>Experience</th>
<th>Required:</th>
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<tbody>
<tr>
<td></td>
<td>Minimum of three years recent RN experience.</td>
</tr>
<tr>
<td></td>
<td>N/A</td>
</tr>
</tbody>
</table>

| Knowledge/Skills/Abilities | N/A |

**Department Specific Requirements**

| N/A |

**Testing**

| N/A |

### PHYSICAL REQUIREMENTS
Physical Activity/Amount of Time per Shift:

Activity:
- Stand - Less than 1/3
- Walk - Less than 1/3
- Sit - 1/3 - 2/3
- Use hands to finger, handle or feel - 1/3 - 2/3
- Reach with hands and arms - 1/3 - 2/3
- Reach above shoulder level - Less than 1/3
- Climb or balance - Less than 1/3
- Stoop, kneel, bend, crouch or crawl - Less than 1/3
- Talk or hear - 1/3 - 2/3
- Repetitive motion of tasks/activities - 1/3 - 2/3
- Repetitive keyboard use - 1/3 - 2/3
- Close vision - 1/3 - 2/3
- Distant vision - 1/3 - 2/3
- Color vision - 1/3 - 2/3
- Depth perception - 1/3 - 2/3
- Drive a vehicle - Less than 1/3

Lift Weight:
- Up to 10 pounds - 1/3 - 2/3
- Up to 25 pounds - 1/3 - 2/3
- Up to 50 pounds - Less than 1/3
- Up to 100 pounds - None

Push or Pull:
- Up to 25 pounds - Less than 1/3
- Up to 50 pounds - Less than 1/3
- Up to 100 pounds - Less than 1/3
- More than 100 pounds - Less than 1/3

The following conditions are present for this job:

Environmental Conditions:
- Fumes or airborne particles - No
- Toxic or caustic chemicals - No
- Extreme cold (non weather) - No
- Extreme heat (non weather) - No
- Risk of electrical shock - Yes
- Risk of radiation - Yes
- Exposure to latex - Yes
- Exposure to blood or other body fluids - Yes

RATINGS

<table>
<thead>
<tr>
<th>Exceeds</th>
<th>Consistently exceeds Kaweah Delta Health Care District's high standard of performance.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meets</td>
<td>Meets Kaweah Delta Health Care District's high standard of performance.</td>
</tr>
<tr>
<td>Needs Improvement</td>
<td>Needs Improvement to meet Kaweah Delta Health Care District's high standard of performance.</td>
</tr>
</tbody>
</table>

JOB RESPONSIBILITIES

Essential
1. Identifies needs and facilitates provision of services with physicians, nurse managers and multidisciplinary team members as the patient moves through the continuum of care.

Assessment
1. Acts as a resource person for clinical care issues, identifies action plans, and facilitates communication with appropriate physician(s) for direction.
2. Assists and communicates with physician offices, admission staff and all appropriate departments to discuss new admissions, demographic information, and other data pertinent to the patient/family which may affect their care.
3. Evaluates the assessment process of new patients within 24 hours of admission or the first working day to determine needs and preliminary discharge plans.

Planning
1. Establishes a specific plan with action steps for each patient within assigned population.
2. Collaborates with the patient/family, care team, and physician(s) to determine goals and objectives to achieve patient/family outcomes, which include physical and psychological factors.
3. Takes the lead in assessing care plan progression and revising care plan as necessary.
4. Rounds with physicians and multidisciplinary team.
5. Coordinates with the multidisciplinary team to ensure discharge planning goals and objectives are developed and modified as needed.

Implementation
1. Takes the lead in moving patients through the continuum of care in a timely, cost effective, and safe manner.
2. Assists in the organization and integration of resources needed to meet stated goals and plans. Works with patient, family, multidisciplinary team, and outside services to accomplish set outcomes.
3. Supervises implementation of treatment plan, including appropriate use of pre-printed orders.
4. Documents in patient Progress Notes information including significant patient data, problems identified, assessment needs, and treatment goals. Documents statistical variances in the electronic Case Management IS system.
5. Makes timely referrals for services.

Evaluation
1. Evaluates treatment plan for appropriateness and monitors progress towards outcomes. Suggests appropriate level of care when changes in level of function, medical, and psychological issues arise.
2. Reviews medical records of patients for proper and timely documentation of services provided, evidence of functional progress.
3. In collaboration with patient, family, and multidisciplinary team, changes the plan of care as appropriate.

The nurse's practice is guided by the Code for Nurses.
1. Decisions and actions on behalf of patients/residents are determined in an ethical manner.
2. Maintains patient confidentiality within legal and regulatory parameters.
3. Acts as a patient/resident advocate and assists patients/residents in developing skills so they can advocate for themselves.
4. Delivers care in a nonjudgmental and nondiscriminatory manner that preserves patient autonomy, dignity and rights.

Addendum (essential for specific dept)

POST ACUTE CARE CASE MANAGER:
1. Reviews and screens 100% of patients same day referred to TCS using InterQual Criteria.
2. Facilitates transition of patient more efficiently to TCS by ensuring proper documentation, orders, and arrangements are complete for timely transfer.
3. Provides ideal work environment.
4. Acts as a patient/resident advocate and assists patients/residents in developing skills so they can advocate for themselves.
5. Delivers care in a nonjudgmental and nondiscriminatory manner that preserves patient autonomy, dignity and rights.

PROGRAM LIAISON FOR INPATIENT REHABILITATION:
1. Assesses the patient's program to proceed in an orderly, purposeful, and goal directed manner.
2. Monitors the participation of the person served on an ongoing basis.
3. Participates consistently in team conferences concerning the person served.
4. Adheres to District Attendance Policy.
5. Provides ideal work environment.
6. Acts as a patient/resident response to treatment and determines need for intervention and/or referral.

CARDIAC SURGERY CARE COORDINATOR:
1. Serves as the Cardiac surgery program liaison to patients, their families, and the cardiac care team. Provides periodic updates during surgery, concentrating on emotional support and education to the family.
2. Facilitates and coordinates care with referral physicians, outside hospitals, admission staff, and surgical department to arrange transfer of potential patients referred to open heart surgery.
4. collaborate with referral physicians, outside hospitals, admission staff, and surgical department to arrange transfer of potential patients referred to open heart surgery.
5. Collaborates with multidisciplinary team and case manager for individual patient discharge needs and plan.
6. Attends regular in-services, staff meetings, and also attends District educational opportunities as assigned.

Additional
1. Demonstrates the knowledge and skills necessary to provide care and services appropriate to the population served on the assigned unit or work area.
2. Performs other duties as assigned.

Behavioral Standards of Performance
1. Compassionate Service - Quality care is always delivered with compassion and attention to detail in an effort to exceed the needs of those we serve.
2. Respect - Collaborates effectively with others and is socially and interpersonally skilled.
3. Communication - Communicates, both in words and actions, in a way that instills trust, confidence and good will.
4. Safety - Individually accountable for safety and supports those who put safety first.
5. Personal Ownership - Takes pride in our facility and the services we provide to our community.
6. Privacy - Ensures our customers’ right to privacy by creating and maintaining a secure and trusting environment. Information is kept confidential and restricted to situations where the information is necessary to meet the customers’ health needs.
7. Professional Image - Maintains professional workplace environment which reflects respect for those we serve. A confident, professional image is essential.
8. Commitment to Colleagues - Committed to working as a team with all of our colleagues.
9. Call lights - The needs of our patients are our priority. Every employee is responsible for answering call lights ("call lights" may refer to anything related to the responsiveness to customers).

Attendance
1. Adheres to District Attendance Policy.
2. Attends regular inservices, staff meetings, and also attends District educational opportunities as assigned.

Department Goals
1. Achieves Outstanding Health Outcomes
2. Provides Excellent Service
3. Provides Ideal Work Environment
4. Maintains Financial Strength

Hospital Cornerstones
May be weighted in next fiscal year.

1. Achieves Outstanding Health Outcomes
   - VBP Composite Patient Safety Measure (PSI-90; Composite of 8 Separate Patient Safety Indicators)- Target score of < 0.487.
   - Medicare Acute LOS- Target score of < 20%.
2. Provides Excellent Service
   - HCAHPS Survey Patient Experience: Cumulative Percentage of Patients Giving Overall Hospital Rating of a 9 or 10 ("Top Box")- Target score of > 71%
3. Provides Ideal Work Environment
   - Employee Partnership Survey- Effective Organizational and Departmental Action Plans Responsive to the Improvement Opportunities Identified by Survey Respondents.
4. Maintains Financial Strength
   - Operating Margin (Operating Revenue – Operating Expenses)/Operating Revenue- Target % of > 3.5%.
1. This section is designed for the supervisor to identify areas of accomplishment. This may include areas where an employee met department goals or exceeded expectations.

2. This section is designed for the supervisor to identify what development needs are required to support the employee's growth in the coming year. When determining development areas, we should assist the employee to enhance existing strengths and also develop new skills. Development opportunities can include in-house training, job assignments, cross-training, or participation in special projects. Other areas for improvement may also be documented here.

### 360 FEEDBACK (Employees and Managers can select N/A when completing evaluation)

I would appreciate your feedback regarding this person's work performance for the year. Respond to the statements below, and make comments and/or suggestions for improvement. I assure your anonymity but will share this information to reinforce positive attributes and work toward improvement in specific areas. Marks of Exceeds or Needs Improvement should be supported by comments.

1. Advocates for the profession of nursing
2. Exhibits self-growth and professional development

### ACKNOWLEDGEMENT

By signing below, I acknowledge that I have received this performance review and have had the opportunity to discuss the results with my department manager/immediate supervisor. I have reviewed and understand the District's Code of Conduct and agree to abide by it.

### OVERALL SUMMARY

**Evaluation Scoring:**

Any employee that has reached the maximum salary for their grade will receive the difference in a merit lump sum.

**Award Determination:**

Total weighted average is calculated on the selections made throughout the form. Section values are as follows:

- Job Responsibilities 40%
- Kaweah Care 40%
- Attendance 5%
- Department Goals 15%

The Percent of Increase may change at the beginning of each fiscal year due to approved budget.

<table>
<thead>
<tr>
<th>Percentage of Overall Score</th>
<th>Total Weighted Average</th>
<th>Percent of Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>0% - 25%</td>
<td>.00 - .50</td>
<td>0%</td>
</tr>
<tr>
<td>26% - 50%</td>
<td>.51 - 1.00</td>
<td>1.0%</td>
</tr>
<tr>
<td>51% - 63%</td>
<td>1.01 - 1.25</td>
<td>1.5%</td>
</tr>
<tr>
<td>64% - 75%</td>
<td>1.26 - 1.50</td>
<td>2.0%</td>
</tr>
<tr>
<td>76% - 100%</td>
<td>1.51 - 2.00</td>
<td>2.5%</td>
</tr>
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