

Case Management Competencies

Assessment

Knowledge of:

- Formal and informal assessment practices and available assessment resources in the state
- The population/disability/culture of the recipient being served

Skills and Abilities to:

- Apply interviewing skills such as active listening, supportive responses, open-and closed-ended questions, summarizing, and giving options.
- Engage recipients and families to elicit, gather, evaluate, analyze and integrate pertinent information, and form assessment conclusions.
- Recognize indicators of risk (health, safety, mental health/substance abuse).
- Gather and review information through a holistic approach, giving balanced attention to individual, family, community, educational, work, leisure, cultural, contextual factors, and recipient preferences.
- Consult other professionals and formal and natural supports in the assessment process.
- Discuss findings and recommendations with the recipient in a clear and understandable manner.

Care Planning

Knowledge of:

- The values that underlie a person-centered approach to providing service to improve recipient functioning within the context of the recipient's culture and community.
- Models of wellness-management and recovery.
- Biopsychosocial theories of practice, evidenced-based standards of care, and practice guidelines.
- Processes used in a variety of models for group meetings to promote recipient and family involvement in case planning and decision-making.
- Interventions appropriate for assessed needs.

Skills and Abilities to:

- Identify and evaluate a recipient's existing and accessible resources and support systems.
- Develop an individualized care plan with a recipient and his or her supports based on assessment findings that includes measurable goals and outcomes.

Linkage/Referral

Knowledge of:

- Community resources such as medical and behavioral health programs, formal and informal supports, and social service, educational, employment, and housing resources.
- Current laws, regulations, policies surrounding medical and behavioral healthcare.

Skills and Abilities to:

- Research, develop, maintain, and share information on community and other resources relevant to the needs of recipients.
- Maintain consistent, collaborative contact with other health care providers and community resources
- Initiate services in the care plan in order to achieve the outcomes derived for the consumer's goals.
- Assist the consumer in accessing a variety of community resources.

Monitoring & Follow-Up

Knowledge of:

- Outcome monitoring and quality management
- Wellness-management, recovery, and self-management
- Community consumer-advocacy and peer support groups

Skills and Abilities to:

- Collect, compile and evaluate data from multiple sources
- Modify care plans as needed with the input of recipients, professionals, and natural supports
- Discuss quality-of-care and treatment concerns with the recipient, professionals, formal and natural supports.
- Assess the motivation and engagement of the recipient and his or her supports.
- Encourage and assist a recipient to be a self-advocate for quality care.

Professional Responsibility

Knowledge of:

- Importance of professional ethical standards and the consequences of violating ethical standards
- Quality assurance practices and standards
- Confidentiality regulations
- Required performance standards and case management best practices
- Definitions and fundamental concepts of culture and diversity
- Origins and tenets of one's personal value system, culture background, and beliefs; understands how this may influence actions and decisions in practice
- Client differences in culture and ethnicity

Skills and Abilities to:

- Use critical thinking skills and consultation with other professionals to make ethical decision and conduct ethical case management
- Form constructive, collaborative relationships with recipients of various cultures and use effective strategies for conducting culturally-competent case management
- Discern with whom protected health information can be shared
- Communicate clearly, both verbally and in writing
- Discern the severity of family problems are beyond the case manager's skill or responsibility, and when referrals to other professionals are necessary
- Identify areas for self improvement, pursue necessary education and training, and seeks appropriate supervision

The LP obtains appropriate continuing professional education as defined by licensure.

The LP practices within defined scope of practice and competence as defined by licensure.

The LP recognizes when clinical supervision or consultation is necessary, and pursues it.