

<b>B&amp;B Care Services, Inc.</b>	<b>Policies and Procedures</b>  <b>Title: Case Manager Assistant</b>  <b>Section: EDWP</b>	Policy Number: EDWP HR Origination Date: 09/2023 Reviewed: Effective Date: 09/2023
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## JOB DESCRIPTION AND PERFORMANCE EVALUATION

### TITLE: CASE MANAGER ASSISTANT

**EMPLOYEE:** \_\_\_\_\_ **MANAGER:** \_\_\_\_\_

#### I. RESPONSIBILITIES

The Case Manager Assistant employee provides administrative support to the agency following agency policies and procedures, in congruence with state and federal guidelines. Answers phones timely and pleasantly and performs duties as assigned.

#### II. MAJOR AREAS OF RESPONSIBILITY

##### Code of Conduct

1. Always works as a team player to provide quality care, whether direct or indirect. Within scope of all applicable regulations and requirements, each employee will assist other team members in accomplishing their job duties in order to “get the job done”.
2. Holds self and team member accountable for knowledge of and full compliance with customer service performance standards as listed on all team members “job descriptions.” Customer is defined as participant, family, caregiver, physician, visitor, fellow employee, volunteer, supplier and payor.
3. Supports and participates in quality improvement activities.

##### Job –Specific Areas of Responsibility

1. Performs all duties as assigned.
2. Completes and documents monthly contacts within the required Standards of Promptness and agency Standard Operating Procedures.
3. Works directly under the supervision of the Team Leader.
4. Assists Case Managers and Unit Clerk with communication between participants and providers.
5. Completes and documents EDWP Notifications to providers as directed.
6. Answers and assist with all phone calls.
7. Attend all team meetings as assigned.
8. Maintains participants files in WellSky and B&B One Drive in accordance with programmatic and agency protocols.
9. Assist Unit Clerk, as directed, with Re-brokering services.

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10. Assist with Quality Data Collection using Standard Operating Procedure Quality Tool.
11. All other duties as assigned that may include, but not limited to: Annual Medicaid Reverification and scheduling T Sheets.

### **III. QUALIFICATIONS**

#### **Education**

High school graduate or equivalent education. Advanced course work in business operations/office procedures, data entry and PC software use strongly preferred. Strong interpersonal skills and proper telephone etiquette a must.

Education and working knowledge in computer usage and Microsoft Office, Word, Excel, etc. beneficial.

#### **Experience**

A thorough knowledge of office procedures and excellent organizational skills is preferred.

Working knowledge and proficient with Microsoft Office Products strongly needed.

#### **Other Requirements**

Valid driver's license and current automobile liability insurance preferred.

Report of Motor Vehicle Records for the past 5 years.

Drug Free Workplace enforced.

#### **Knowledge, Skills and Abilities**

Demonstrated level of interpersonal skills necessary to effectively communicate with clients, staff, physicians, and other home care personnel with whom daily interactions must take place.

Excellent verbal and written communication skills a must.

Demonstrated knowledge of proficiency in Microsoft Office a must. Includes Word, Excel, and other Microsoft programs.

Demonstrated knowledge of basic filing skills, to include electronic record keeping.

Knowledge of office procedures and equipment (telephone etiquette, photocopying, mail distribution, personal computer, fax machines, etc.)

Knowledge of organizational skills and keyboarding skills.

Able to use independent judgment and mental/visual skills required in order to assist with work in the various areas of filing, telephones, data entry, etc.

Reliable means of transportation.

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**IV. PHYSICAL REQUIREMENTS**

**A. WORKING CONDITIONS**

Works in climate-controlled office or remotely.  
Has the potential for being outside or in homes that are not climate controlled.  
Potential for heavy workloads with deadlines.  
At times can be stressful.

**B. PHYSICAL DEMANDS**

Prolonged sitting may be required.  
Prolonged use of computer may be required with intense visual concentration.  
Operates motor vehicle as required, with long range travel rarely.  
Requires lifting and handling of office products up to 50 pounds.  
Vision corrected or adapted to be able to perform duties.  
Requires hearing corrected or adapted to be able to communicate effectively.  
Mobility required, but can rest at will.

**I have read and understand the job description EDWP Case Manager Assistant, and am able to perform the essential functions of the position.**

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Administrator or Designee**

\_\_\_\_\_  
**Date**

Employee comments:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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Name: \_\_\_\_\_ Date of Hire: \_\_\_\_\_ Evaluation Date: \_\_\_\_\_

**Performance Appraisal**

**I certify that my supervisor has reviewed my performance appraisal results with me.  
My signature does not necessarily indicate that I agree with the appraisal results.**

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor's Signature

\_\_\_\_\_  
Date

**Performance Summary**

(Note: A plan to correct the behavior must accompany appraisal for 2 or more below expected ratings, for ratings of 1 or 3 the evaluator must include a brief explanation to support the below of above expected level of performance ratings.)

Overall Average Rating: \_\_\_\_\_ Standard with the ratings of 3:

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Please identify what Goal the Company needs to implement for this person:

**Goal:**

Please identify the Personal and Professional Goals of the Employee:

**Personal Goal:**

**Professional Goal:**