

CASE MANAGER II COMPETENCIES ASSESSMENT

OKLAHOMA TREATMENT SERVICES

Employee Name _____

Program _____

Date ____/____/____

The Florida Certification Board (FCB) designs, develops, and manages programs for over thirty health and human services professions and certifies more than 20,000 professionals statewide, including those in the child welfare, mental health, addiction, and health fields, by ensuring that they meet education, training, experience and testing criteria.

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Please rate your level of training need in the following areas.

ENGAGEMENT AND ASSESSMENT

COMPETENCY 1:

Facilitate the client’s understanding of the rationale, purpose and procedures associated with case management services.

Strong need for training

Moderate need for training

No need for any further training

Obtain relevant information from the client and meaningful collateral sources in order to assess the client’s current situation and identify any immediate needs, including but not limited to the safety and well-being of the client in his or her natural environment.

Strong need for training

Moderate need for training

No need for any further training

Administer the appropriate assessment instruments to gather information and initiate a process of shared decision making and goal setting focused on the client’s strengths, needs, abilities and preferences

Strong need for training

Moderate need for training

No need for any further training

Analyze and synthesize assessment data in order to identify problems/opportunities that would benefit from case management intervention.

Strong need for training

Moderate need for training

No need for any further training

Conduct ongoing assessment throughout the life of the case to identify emerging needs and maintain case relevance

Strong need for training

Moderate need for training

No need for any further training

SERVICE PLANNING AND DEVELOPMENT

COMPETENCY 2:

With the client, translate assessment outcomes into functional domains, prioritize needs under each domain into immediate, short-term, and long-term categories, and identify appropriate case management (vs. clinical) interventions

Strong need for training

Moderate need for training

No need for any further training

Involve meaningful collateral sources/others in initial and on-going case management service planning as appropriate and required

Strong need for training

Moderate need for training

No need for any further training

Develop a written case management plan that reflects assessment outcomes; prioritized and mutually agreed upon needs, measurable goals, and objectives, including timeframes; and case management strategies

Strong need for training

Moderate need for training

No need for any further training

Use ongoing assessment and collaboration with the client and meaningful collateral sources/others to review and update the case management plan to reflect emerging needs and maintain relevance

Strong need for training

Moderate need for training

No need for any further training

COORDINATION, LINKAGE AND MONITORING

COMPETENCY 3:

Identify and maintain information about available community resources and develop a professional network in order to meet needs and maximize client outcomes

Strong need for training

Moderate need for training

No need for any further training

Make formal and informal referrals to service providers identified in the case management plan

Strong need for training

Moderate need for training

No need for any further training

Conduct ongoing monitoring activities, including contact with the client, concerned others and service providers, to assess the effectiveness of the case plan strategies and measure progress on achieving case plan outcomes

Strong need for training

Moderate need for training

No need for any further training

Use effective facilitation and problem-solving techniques to improve communication and relationships between all stakeholders and to reconcile potentially differing points of view

Strong need for training

Moderate need for training

No need for any further training

Advocate for the client to promote individual choice and self-determination

Strong need for training

Moderate need for training

No need for any further training

Assist the client to develop self-advocacy skills

Strong need for training

Moderate need for training

No need for any further training

Appropriately terminate case management services, to include providing reasonable notice; securing client and/or significant other's acknowledgement of an agreement to the case termination; and, if appropriate, effectively, and efficiently transitioning the client to the next level of care

Strong need for training

Moderate need for training

No need for any further training

DOCUMENTATION

COMPETENCY 4:

Use best practices for written documentation in order to record all relevant case management services activity and information in a clear, concise, observable/objective, professional and timely manner

Strong need for training

Moderate need for training

No need for any further training

Protect the client's right to privacy and confidentiality according to best practices in preparation and handling of records, especially regarding the communication of client information with third parties
Obtain written consent to release information from the client and/or legal guardian according to agency protocols and administrative rules

Strong need for training Moderate need for training No need for any further training

Document process, progress, and outcome measurements in accord with the client's service plan, assuring a clear linkage between case documentation and the service plan

Strong need for training Moderate need for training No need for any further training

Comply with legal, funder and agency documentation requirements and timelines

Strong need for training Moderate need for training No need for any further training

PROFESSIONAL, LEGAL, AND ETHICAL RESPONSIBILITIES

COMPETENCY 5:

Follow established professional codes of ethics and standards of practice in order to promote the best interests of the client and the profession

Strong need for training Moderate need for training No need for any further training

Perform all job tasks according to professional, ethical, and legal standards

Strong need for training Moderate need for training No need for any further training

Follow federal, state, and other governing rules and regulations in order to promote and protect client rights

Strong need for training Moderate need for training No need for any further training

Recognize individual differences of the counselor and client by gaining knowledge about personality, culture, lifestyles, gender, sexual orientation, special needs, and other factors that influence client behavior in order to provide case management services that are sensitive to the uniqueness of the individual

Strong need for training Moderate need for training No need for any further training

Seek supervision, training, and technical assistance as necessary to maintain competence and enhance professional effectiveness

Strong need for training

Moderate need for training

No need for any further training

Employee Signature/date