

Position Title: Case Manager
Department: Case Management
FLSA Status: Exempt
Reports to: Director of Intake and Case Management
Prepared by: Human Resources
Revision Date: August 2025

Position Overview

Reporting to either the Director of Case Management and Intake, Assistant Director of Case Management, or Case Management Team Lead and working under general supervision, the employee is responsible for managing and monitoring the care of individuals, who have been adjudicated incapacitated by the Courts and appointed to the Agency. The Case Manager is responsible for providing a series of activities which include planning, arranging for and coordination of appropriate community-based services for an eligible ward. Provides comprehensive assessments and monitoring of ward's progress to ensure the effective delivery of services. Coordinates all available resources on behalf of the wards by performing the following duties.

Primary Accountabilities

Monitors the care of legally incapacitated clients/wards on a monthly basis, with physical and mental impairments, by determining if the care is appropriate based upon resources available to each ward.

Assists in securing and making medical, financial and social decisions, which most benefits the ward considering the resources available to include approving appropriate medications based on physician recommendations. Coordinates the implementation of medical and or social services available to the ward, as needed. Acts in the clients' best interest and utilizes best judgment as necessary.

Assists in obtaining feedback from proper sources during Do Not Resuscitate (DNR) requests by physicians.

Reviews and approves Hospice Admissions documents.

Provides supportive counseling, as well as reality testing in order to determine if the client/ward's social functioning can improve.

Maintains ongoing contact with nurses, physicians, social workers, facility administrators, relatives, friends, etc. regarding ward.

Monitors and arranges for burial upon death of ward including contact of all appropriate family/next of kin, if applicable.

Refers clients to community resources and other organizations.

Compiles records and prepares legally required reports for filing with the Probate Court of Miami-Dade County, Florida, and the State of Florida.

Secures receipt of all applicable doctor's letters by specified deadlines, required for completion of Annual Report.

Attends court hearings as needed including status conference, Baker Act and criminal court hearings.

Reviews service plans and performs follow-up to determine if appropriate care has been provided to wards.

Monitors, coordinates, and negotiates wards' room and board arrangements and agreements. Monitors ward finances to ensure funds are kept under assets to acquire and/or maintain eligible benefits.

Makes purchases for wards when appropriate to ensure they are in safe financial limits and loss of benefits is prevented.

Requests pre-need, burial accounts, trusts, restricted savings, or other services as needed.

Coordinates with all other Agency departments as it relates to specific ward needs.

Responds to emergency calls received from wards, family members, friends, etc. after regular hours on a rotating basis using Company-provided On-Call cellular phone.

Writes and enters into Guardian Management System (GMS) progress notes (activity logs) within specified time periods that are pertinent regarding each of the wards when there is any information such as visits, phone calls and other contact is performed.

Prepares various reports as required by the Probate Court or governmental agencies within specified deadlines.

Additional responsibilities are assigned as needed.

SUPERVISORY RESPONSIBILITIES

This position has no supervisory responsibilities.

Education, Skill Requirements and Other Essential Functions

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

EDUCATION and/or EXPERIENCE

Bachelor's degree (B. A. or B.S.) from an accredited, four-year college or university and a minimum of three (3) years related experience and/or training; or equivalent combination of education and experience is required.

Must be very proficient in computers, especially in all Microsoft Office applications such as Word, Excel, Outlook for email and Internet and other internal and external software applications. Must be knowledgeable in HIPAA guidelines.

LANGUAGE SKILLS

Ability to read, and interpret general periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports for the Probate Court of Dade County, Florida and general correspondence. Ability to effectively present information and respond to questions from groups of caretakers, clients, and the general public. Knowledge of a second language (Creole/ Spanish) is helpful but not required.

MATHEMATICAL SKILLS

Ability to add, subtract, multiply and divide in all units of measure, using whole numbers, common functions and decimals. Ability to compare rate, ratio, percent, to draw and interpret simple graphs.

REASONING ABILITY

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, or schedule form.

CERTIFICATES, LICENSES, REGISTRATIONS

Must complete and pass the professional, in-house guardian course and examination within 12 months of hire date. Upon completion, must be willing to maintain the required amount of continuing education units (CEU's) to remain in good standing within the agency and Chapter 744 of the Florida Statutes.

CRIMINAL, DRIVING & CREDIT VERIFICATIONS

As a condition of employment, requires an acceptable criminal background verification, driving record, and credit check during the pre-employment process and throughout employment which is reviewed, verified and approved according to state guidelines.

Working Conditions

PHYSICAL DEMANDS

The physical demands described here 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.

While performing the duties of this job, the employee is regularly required to stand; walk; and use hands to handle or feel. The employee frequently is required to sit, reach with hands and use arms and talk or hear. The employee is occasionally required to stoop, kneel, crouch, or crawl. The employee must frequently lift and/or move up to 10 pounds and occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

Physician concerns – Possibility of contact with clients suffering from TB, MRSA, hepatitis or other conditions. Appropriate vaccinations are encouraged.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate to loud.

Field visits may also include jails, state hospitals, medical facilities and other venues.

Harassment and/or Safety Issues – Potential of having to encounter and/or monitor slightly aggressive persons exist.

ADDITIONAL RESPONSIBILITIES AND REQUIREMENTS

Must have a valid driver's license, vehicle insurance, and be capable of unrestricted travel in the performance of his/her duties.

Read, acknowledged and signed by: _____ on _____.

Signature Date

Print Name