Position Title: Connection Case Manager I and II

Statement of Duties
Duffy Health Center is a patient-centered medical home, and every role requires functioning effectively using a team-based approach. The Connection Case Manager is responsible for performing various activities that facilitate a patient’s access to insurance coverage. The Connection Case Manager is responsible for coordinating with patients, providers, and outside agencies to provide support, guidance, and advocate for the needs of Duffy Health Center patients. Work includes conducting patient interviews and assessing patient needs, advocating for patients, coordinating with community groups, state and federal agencies, and local organizations to assist patients in obtaining health insurance and other appropriate social services, resources, and assistance. The Connection Case Manager is responsible for gathering, reviewing, entering and scanning all patient data including demographic information, insurance information and patient consents. This position is deemed essential* in the DHC Emergency Operations Plan.

Position Functions
The essential functions or duties listed below are intended only as illustration of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if work is similar, related, or a logical assignment to the position.

1. Meets with patients to assess needs and determine eligibility for services. Provides guidance, resources and referral assistance.

2. Explains Duffy Health Center’s scope of services, including Integrated Care Model to patients.

3. Gathers, reviews and inputs into the electronic health record all information necessary to register an individual and updates as appropriate.

4. Assists patients in completing applications for benefits, gathering and verifying information required for applications, following up on the status of applications, and solving any related problems.

5. Works collaboratively with members of the multi-disciplinary team at Duffy Health Center in order to provide integrated care.

6. Coordinates with patients, providers, government agencies, and non-profit organizations to obtain appropriate social services, resources, and referrals.
7. May conduct outreach services to at-risk individuals assigned to Duffy Health Center by health insurance plans.

8. Maintains confidential records of benefits / referral management activities and records information in the agency’s electronic medical record in a timely fashion.

9. Prepares reports as required by Duffy Health Center, grant source, and as otherwise required.

10. Builds relationships with community groups and organizations to strengthen network of resources for patient referrals.

**Supervision**

Work is performed under the general direction of the Patient Access Supervisor. The employee plans and carries out the regular work in accordance with standard practices and previous training, with substantial responsibility for determining the sequence and timing of action and substantial independence in planning and organizing the work activities. The employee solves most problems of detail or unusual situations independently. Instructions for new assignments or special projects usually consist of statements of desired objectives, deadlines and priorities. Technical and policy problems or changes in procedures are regularly discussed with supervisor. Work is generally reviewed only for technical adequacy, appropriateness of actions or decisions, and conformance with policy or other requirements.

The employee has access to confidential patient information.

**Job Environment**

The work requires examining, analyzing and evaluating facts and circumstances surrounding individual problems, situations or transactions, and determining actions to be taken within the limits of standard or accepted practices. Guidelines include a large body of policies, practices and precedents which may be complex or conflicting, at times. Judgment is used in analyzing specific situations to determine appropriate actions. Employee is expected to weigh efficiency and relative priorities in conjunction with procedural concerns in decision making. Requires understanding, interpretation and applying complex federal, state and local regulations. Assignments typically involve evaluation and interpretation of factors, conditions or unusual circumstances.

Errors could result in delay or loss of service, and improper case management.

The position has constant contact with patients and families/caregivers, co-workers, and outside agencies and organizations in person, via email and on the phone. The purpose for
contact is to conduct interviews, collect data and information, advocate for patient/patient needs, resolve problems, make referrals, and give or receive information and assistance.

**Recommended Minimum Qualifications**

**Physical and Mental Requirements**
Employee works in a healthcare office and out in the field while assisting patients. Employee is required to walk, sit, talk/listen and use hands more than 2/3 of the time; and stand and reach up to 1/3rd of the time. Employee occasionally lifts up to 10 lbs., and seldom lifts up to 30lbs.; Normal vision is required for the position. Equipment operated includes office machines, automobile, and computers. Employee may be exposed to hostile individuals and/or situations.

**Requirements under the DHC Emergency Operations Plan**
During a declared Emergency, staff deemed as Essential Personnel are expected to work onsite at Duffy Health Center and Non-Essential Personnel are expected to work remotely. This position is Essential and therefore this position may be expected to work onsite during a declared emergency.

**Education and Experience**
A candidate for this position must have a Bachelor’s Degree in Human Services, Social Work, Counseling, or Education and at least two (2) years of experience in case management, preferably working with the homeless/at risk population; or an equivalent combination of education and experience.

**Licenses and Certifications Required**
A candidate for this position must have a valid driver’s license

**Knowledge, Skills and Abilities**
A candidate for this position should have:

Knowledge of:
- Basic knowledge of state and federally sponsored insurance programs including MassHealth, Medicare and Health Safety Net.
- Case management practices and procedures
- Local groups and organizations providing social services
- Issues related to homeless and at-risk individuals, including: mental illness, substance abuse, criminal history, and physical and sexual abuse
- Protocol for handling crisis situations
- Title VI of the Civil Rights Act of 1964, including National Origin Discrimination
• HIPAA regulations.

Skill in:
• Assessing and addressing the needs of homeless and at-risk individuals
• Handling multiple priorities simultaneously in a timely manner
• Planning, prioritizing and problem solving
• Collecting and recording information and preparing reports
• Effective written and verbal communication.
• Computer and keyboarding skill

And ability to:
• Maintain composure in challenging situations; Separate self from the personalization of challenging patients; interact effectively and appropriately with homeless and at-risk individuals
• Comprehend and guide patients effectively to achieve their goals/obtain the best benefit possible for the patient
• Maintain confidentiality of information
• Commit to the philosophy and mission of Duffy Health Center which serves the homeless and at-risk population, and to the team-based approach as part of PCMH.

Essential*

*Employees designated as “essential,” a standard Incident Command term used in Emergency Management, typically work on-site to provide direct clinical care or management of such.

Non-essential*

*Employees designated as “non-essential,” a standard Incident Command term used in Emergency Management, typically work off-site remotely to provide either clinical or administrative support to clinical operations.