

## UW HEALTH JOB DESCRIPTION

### RN Complex Case Manager

Job Code: 801022	FLSA Status: Exempt	Mgt. Approval: D. Gatzke	Date: 11/2017
Department : Admin – Patient Resources		HR Approval: K. Szudy	Date: 11/2017

#### JOB SUMMARY

Under the supervision of the Complex Case Management Program Nurse Manager, the Registered Nurse (RN) Complex Case Manager (CCM) is responsible for intake and providing case management services for the medically and/or socially complex patients who are medically homed within UW Health. The patient population covered will include significantly complex medical conditions, and/or social-economic and mental health co-morbidities. The goal of the program will be to assist these patients to achieve optimal health and/or independence in managing their care. To achieve this goal the manager will demonstrate and apply knowledge of the philosophy/principles of comprehensive case management, patient-centered, culturally sensitive care coordination and management of complex patients.

The case manager will be responsible to develop plans for patient and family self-care competence, including motivational assessment, assessing for desired level of involvement and coaching for adherence to care plan. CCM will provide nursing assessment, create and monitor patient/family care plans, including end of life planning. The primary contact with the patient, family and other involved care providers will be by telephone, and electronic medical record (EMR).

The case manager promotes knowledge of this program throughout UW Health, additional hospitals and programs where UW Health medically homed patients live and receive care. In addition, s/he is responsible to create and sustain partnerships with community resources and support agencies.

#### MAJOR RESPONSIBILITIES

##### Case Management

1. Assess the physical, functional, social, psychological, environmental, learning and financial needs of patients.
2. Identify problems, goals and interventions designed to meet patient's needs, including prioritized goals that consider the patient/caregivers goals, preferences and desired level of involvement in the case management plan.
3. Create care plan including objectives, goals and actions designed to meet patient's needs.
4. Provide appropriate interventions which demonstrate knowledge of and sensitivity toward cultural diversity and religious, developmental, health literacy, and educational backgrounds of the population served. Utilize interpreter services per policy.
5. Assess the patient's formal and informal support systems, including caregiver resources and involvement as well as available benefits and/or community resources.
6. Implement and monitor the care plan to ensure the effectiveness and appropriateness of services
7. Evaluate patient's progress toward goal achievement, including identification and evaluation of barriers to meeting or complying with case management plan of care, and systematically reassess for changes in goals and/or health status.
8. Research alternative treatment options and selecting and locating appropriate providers which can include facilitation of referrals.
9. Communicates with primary care physician and members of the comprehensive care team regarding status of patient.
10. Utilize motivational interviewing skills to build patient engagement in case management plan of care.
11. Provide education, information, direction and support related to care goals of patients.
12. Act as a patient advocate and assist with problem solving and addressing any barriers to care or compliance with care plan.
13. Coordinate care and develop treatment plans.
14. Provide referrals to appropriate community resources; facilitate access and communication when multiple services are involved; monitor activities to ensure that services are actually being delivered and meet the needs of the patient, coordinate services to avoid duplication.
15. Maintain accurate patient records and patient confidentiality.
16. Measure outcomes and effectiveness of case management including clinical, financial, quality of life and patient/family satisfaction.
17. Engage in professional development activities to keep abreast of case management practices and patient engagement strategies.
18. Facilitate disease prevention and health promotion with patients and families
19. Determine psychosocial needs & complex medical needs of all patients

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20. Troubleshoots problems regarding operational and clinical procedures that may affect patient outcomes.
21. Attend mandatory training sessions and staff meetings as assigned.

**Medical Management:**

22. Participate in prospective, concurrent, and retrospective case reviews involving targeted patients.
23. Apply all internal criteria and guidelines used to make the determination if care management is improving outcomes
24. Identify risk factors and teach patients clear pathway of response to identified triggers
25. Promote patient and family responsibility and self-management
26. Document all relevant information following department policy guidelines.
27. Maintain knowledge of operational procedures and case management program components.
28. Promote chronic disease management concepts, health screening and preventive health initiatives for targeted patients
29. Participate and promote appropriate performance improvement projects
30. Develop, implement, and evaluate department initiatives and goals as assigned.

**Program Development:**

31. Assist with the collection, analysis, and benchmarking of utilization data.
32. Collaborate in the development of protocols and guidelines for patient care management.
33. Promote program to internal and external care providers
34. Adhere and uphold UWMF Mission, Vision and Values and UW Health Performance Standards
35. Other tasks as assigned

**ALL DUTIES AND REQUIREMENTS MUST BE PERFORMED CONSISTENT WITH THE UW HEALTH PERFORMANCE STANDARDS.**

### JOB REQUIREMENTS

Education	Minimum	Bachelors' degree in nursing or related field Or ADN with 5 years of case management experience with BSN completion within 5 years of hire required
	Preferred	
Work Experience	Minimum	Two years RN experience required
	Preferred	Clinical experience in nursing care of the medically complex patient highly desirable
Licenses & Certifications	Minimum	Maintain state RN licensure in state where employed Maintain CPR certification
	Preferred	Case Management Certification highly desirable
Required Skills, Knowledge, and Abilities		<ul style="list-style-type: none"> <li>• Knowledge and skill in chronic disease management</li> <li>• Excellent verbal and written communication (including documentation) skills</li> <li>• Excellent relationship management with patients, families, and care providers</li> <li>• Professional demeanor</li> <li>• Flexible in trying new things while developing a new care program</li> <li>• Ability to work as a member of a team</li> <li>• Ability to organize and prioritize tasks</li> <li>• Ability to promote/participate in patient centered medical home mode of care</li> <li>• Exceptional customer service skills and understanding of patient and family centered care concepts</li> <li>• Strong organizational skills</li> <li>• Proficient in Microsoft Office</li> <li>• Electronic Medical Record (EMR) experience preferred</li> <li>• Change-agent, embraces new technology</li> <li>• Self-directed</li> <li>• Must have and maintain a valid driver's license</li> <li>• Is flexible to travel as necessary within the service area</li> <li>• Case Management Certification must be obtained within 3 years of hire and maintained during employment.</li> </ul>

### AGE SPECIFIC COMPETENCY (Clinical jobs only)

Identify age-specific competencies for direct and indirect patient care providers who regularly assess, manage and treat patients.

**Instructions:** Indicate the age groups of patients served either by direct or indirect patient care by checking the appropriate boxes below. Next,

<input type="checkbox"/> Infants (Birth – 11 months)	<b>X</b>	<input type="checkbox"/> Adolescent (13 – 19 years)
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	<b>X</b>	Young Adult (20 – 40 years)		
Preschool (4 – 5 years)	<b>X</b>	Middle Adult (41 – 65 years)		
School Age (6 – 12 years)	<b>X</b>	Older Adult (Over 65 years)		
<b>JOB FUNCTIONS</b>				
Review the employee's job description and identify each essential function that is performed differently based on the age group of the patient.				
<b>PHYSICAL REQUIREMENTS</b>				
Indicate the appropriate physical requirements of this job in the course of a shift. <i>Note: reasonable accommodations may be made available for individuals with disabilities to perform the essential functions of this position.</i>				
<b>Physical Demand Level</b>	<b>Occasional</b> Up to 33% of the time	<b>Frequent</b> 34%-66% of the time	<b>Constant</b> 67%-100% of the time	
<b>X</b>	<b>Sedentary:</b> Ability to lift up to 10 pounds maximum and occasionally lifting and/or carrying such articles as docket, ledgers and small tools. Although a sedentary job is defined as one, which involves sitting, a certain amount of walking and standing is often necessary in carrying out job duties. Jobs are sedentary if walking and standing are required only occasionally and other sedentary criteria are met.	<b>Up to 10#</b>	<b>Negligible</b>	<b>Negligible</b>
	<b>Light:</b> Ability to lift up to 20 pounds maximum with frequent lifting and/or carrying of objects weighing up to 10 pounds. Even though the weight lifted may only be a negligible amount, a job is in this category when it requires walking or standing to a significant degree.	<b>Up to 20#</b>	<b>Up to 10#</b> or requires significant walking or standing, or requires pushing/pulling of arm/leg controls	<b>Negligible</b> or constant push/pull of items of negligible weight
	<b>Medium:</b> Ability to lift up to 50 pounds maximum with frequent lifting and/or carrying objects weighing up to 25 pounds.	<b>20-50#</b>	<b>10-25#</b>	<b>Negligible-10#</b>
	<b>Heavy:</b> Ability to lift up to 100 pounds maximum with frequent lifting and/or carrying objects weighing up to 50 pounds.	<b>50-100#</b>	<b>25-50#</b>	<b>10-20#</b>
	<b>Very Heavy:</b> Ability to lift over 100 pounds with frequent lifting and/or carrying objects weighing over 50 pounds.	<b>Over 100#</b>	<b>Over 50#</b>	<b>Over 20#</b>
List any other physical requirements or bona fide occupational qualifications:				

Note: The purpose of this document is to describe the general nature and level of work performed by personnel so classified; it is not intended to serve as an inclusive list of all responsibilities associated with this position.