

# Case Manager Skills Checklist

## Instructions

- 1 - No Experience (Instruction only, no hands on experience.)
- 2 - Minimal Experience (Have experience but has performed procedure infrequently. Minimal assistance needed.)
- 3 - Experienced (Competent to perform the procedure, task, or skill independently.)
- 4 - Proficient (Able to demonstrate, perform the task or skill proficiently without any assistance. )

General	Experience
Records maintenance skills	① ② ③ ④
Knowledge of community health care and vocational services	① ② ③ ④
Ability to monitor, assess and record client progress against care plan, and make adjustments to plans and services	① ② ③ ④
Strong interpersonal and communication skills and the ability to work effectively with a wide range of cultures in a diverse community	① ② ③ ④
Ability to assess mental status in clients and to develop individual treatment goals and plans	① ② ③ ④
Knowledge of medical billing procedures	① ② ③ ④
Ability to plan, implement, and evaluate individual patient care programs	① ② ③ ④
Ability to gather data, compile information, and prepare reports	① ② ③ ④
Coordinates and monitors services, including comprehensive tracking of client activities in relation to care plan	① ② ③ ④
Assists clients in developing goals and areas of need, and assists in developing treatment plans which are assessed regularly	① ② ③ ④
Conducts medication and mental status assessment and determines required level and frequency of service	① ② ③ ④
Documents all client encounters and contracts made on behalf of clients	① ② ③ ④
Completes and submits billing documentation as appropriate	① ② ③ ④
Maintains comprehensive client files, which may include documents held for safekeeping on behalf of the client	① ② ③ ④
Identifies and provides emergency crisis services as necessary	① ② ③ ④
Makes immediate clinical assessments and responds according to accepted crisis intervention methods and techniques; coordinates other services as appropriate	① ② ③ ④
Assess patients, evaluates effectiveness of care plan and progress made by client, participates in patient treatment planning and case review with patient care providers	① ② ③ ④
Maintains and reports applicable statistics regarding programs and client services	① ② ③ ④
JCAHO	Experience
JCAHO National Safety Goals	<input type="checkbox"/>
JCAHO Prohibited Abbreviations	<input type="checkbox"/>