

**COMPANY CONFIDENTIAL**  
**The Foundation of the Pennsylvania Medical Society**  
**Case Manager I**  
**Position Description**

Position Title: **Case Manager I**

Division/Department: **Physicians' Health Program**

Reports to: **Lead Case Manager, Physicians' Health Program**

Classification: **Full Time, Exempt**

**ORGANIZATION BACKGROUND**

The Foundation of the Pennsylvania Medical Society is a nonprofit, tax-exempt public organization established in 1954 as the philanthropic affiliate of the Pennsylvania Medical Society. Its mission is to sustain the future of medicine in Pennsylvania by providing programs that support medical education, physician health, and excellence in practice. The purpose of the Physicians' Health Program (PHP) is to provide education and information about impairment issues, intervention, triage, and referral, and monitored recovery to physicians, physician assistants, dental professionals and other eligible healthcare professionals. The PHP handles a high volume of telephone calls and digital materials which can take priority over the primary position responsibilities outlined here.

**POSITION SUMMARY:**

This position focuses on providing administrative and professional support to the Physicians' Health Program and assists in managing the current caseload per direction of the Lead Case Manager in cooperation with the Director. This position takes check-in calls from healthcare professionals, new referrals from healthcare professionals, hospitals, treatment centers, Bureau of Professional and Occupational Affairs, and others; completes all standard advocacy letters; and reviews all charts for compliance.

**QUALIFICATIONS: Required Skills/Education/Knowledge**

- Bachelor's degree, CADC Certification
- Degree in Nursing or Dietitian-Nutrition preferred
- 5 years' experience in similar role
- Knowledge of addiction/recovery issues is essential
- Ability to organize and track multiple priorities
- Ability to work effectively with others under stressful conditions
- Proficient in Microsoft Word, Excel, and Outlook
- Ability to work well independently and within a team
- Strong problem-solving skills
- High standard of accuracy and attention to detail
- Strong organizational skills

**SPECIAL REQUIREMENTS:**

This position requires the ability to communicate with and work cooperatively with many different people internally and externally, and the ability to adjust to constant change.

**ESSENTIAL DUTIES:**

1. Receive check-in calls from participants and monitors regarding the participant's compliance with agreement. Assist them with any treatment/monitoring concerns and follow through with any that need case management discussion or attention from senior staff. Review with Program Director/Medical Director immediately if necessary. Notify staff via e-mail or case conference of problems with compliance or other concerns.
2. Receive and manage healthcare professional referrals. Assist in planning intervention and clinical assessment process with PHP medical director and other PHP staff.
3. Perform reviews of participant charts to assure their compliance with their agreement. These reviews occur approximately every three months. During these reviews, the case manager will:

- a. Review chart to ensure the following items are up to date.
  - i) Urine test results.
  - ii) Therapy reports.
  - iii) Workplace monitor reports.
  - iv) Check-in calls.
  - v) Meeting attendance reports.
  - vi) PHP monitor reports.
  - vii) Advocacy letter requests have been sent.
- b. If these items are not in compliance, send letter or database message for participant to contact the PHP.
- c. If no response to contact, meet with PHP staff to determine follow up.
- d. Bring any cases of non-compliance with monitoring requirements to the attention of PHP staff.
4. Assure that pending cases are being followed on a timely basis and evaluations and treatment referrals are being followed. When questions arise, discuss with PHP staff.
5. Assists in maintaining a visible tracking mechanism showing current status of all pending cases.
6. Consult with case management team, program director, medical director and PHP staff about case management issues as needed.
7. Communicate with treatment centers and therapists to obtain status/progress reports on participants.
8. Participate in the presentation of monitoring agreements to new participants in conjunction with the Medical Director and/or other PHP staff.
9. Receive and manage new referrals. Assist in planning intervention and clinical assessment process with case managers, director and medical director and other PHP staff as needed.
10. Make referral for clinical assessment and treatment services.
11. Review and recommend action on check-in call requests, discussing with other case managers, medical director, and other staff as necessary.
12. Participate in case conference review involving medical director and all other staff.
13. Assist in maintaining the PHP database to assure that it is up to date and suggest any corrections to facilitate data entry.
14. Model company culture by advocating with a supportive attitude, educating people while respecting them and their ideas, and navigating using active listening skills.

**OTHER ADDITIONAL DUTIES MAY INCLUDE:**

Assist with coordination of other Foundation, PHP, or PAMED initiatives, as well as other duties as may be requested or assigned.

**WILL COLLABORATE WITH:**

- Medical Directors, Physicians' Health Program
- Lead Case Manager, Physicians' Health Program
- Case Managers, Physicians' Health Program
- Assistant Case Manager, Physicians' Health Program
- Compliance Assistant, Physicians' Health Program
- Executive Director, Foundation
- Sr. Director, Finance & Operations
- PAMED Communications & Marketing Department Staff
- All other Foundation staff as needed

**PHYSICAL ACTIVITIES**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential duties and responsibilities of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- \* Sedentary work. Repetitive motion. Substantial movements (motions) of the wrists, hands, and/or fingers. The worker is required to have close visual acuity to perform an activity such as: preparing and analyzing data and figures; transcribing; viewing a computer terminal; extensive reading. Hearing and speech to communicate

in person, before groups, and over the telephone. Exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects.

\* Operation of a motor vehicle, occasionally

This PDQ accurately reflects the duties, qualifications, and other requirements of this position.

Revised: 08/15/23

EOE - It is the policy of PAMED and the Foundation of PAMED to ensure equal employment opportunity without discrimination or harassment based on race, color, religion, sex (including pregnancy), sexual orientation, gender identity or expression, national origin, age, disability, marital status, veteran status, citizenship, genetic information, possession of a General Educational Development certificate as opposed to a high school diploma, or any other characteristic protected by applicable federal, state or local law. This commitment applies, but is not limited, to decisions made with respect to hiring, placement, compensation, benefits, promotions, demotions, transfers, terminations, layoffs, return from layoffs, administration of benefits, and all other terms and conditions of employment.