

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

Position Title: **Case Manager II**

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

Reports to: **Director, 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 all eligible healthcare professionals. The PHP handles a high volume of telephone calls and printed material, which can take priority over the primary position responsibilities outlined here.

POSITION SUMMARY:

The Case Manager II focuses on providing administrative and professional support to the Physicians' Health Program and assists in managing the current caseload per direction of the Director. This position takes check-in calls from participants; new referrals from physicians, hospitals, treatment centers, Bureau of Professional and Occupational Affairs, and others; completes advocacy letters; and reviews all charts for compliance. This position is more advanced in client case management and decision making due to master's training and case management experience.

QUALIFICATIONS: Required Skills/Education/Knowledge

- Master's Degree in psychology or a related field; Certification in alcohol and drug counseling or case management or Pennsylvania Board licensed professional counselor, social worker, marriage and family therapist
- 5 years' experience in similar position
- Knowledge of addiction/recovery issues, mental health, and occupational health is essential
- Excellent oral and written communication skills
- Attention to detail, accuracy, and dependability
- Ability to organize and track multiple priorities
- Ability to work effectively with others under stressful conditions
- Ability to learn, interpret, and apply a variety of complex procedures with minimal guidance
- Strong interpersonal skills
- Proficient in Microsoft Word, Excel, and Outlook

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 conference discussion or attention from senior staff. Review with 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 referrals of eligible healthcare professionals. Assist in planning intervention and clinical assessment process with PHP medical director and other PHP staff.
3. Make referral for clinical assessment and treatment services.

4. Transition cases through the continuum in a timely manner (intake, evaluation, treatment and monitoring). When questions arise, discuss with PHP staff.
5. Assist in maintaining a visible tracking mechanism showing the status of all pending cases.
6. Perform reviews of participant charts to assure compliance with their agreement. These reviews occur approximately every three months. During these reviews, the case manager will:
 - a. Review chart to assure the following items are up to date.
 - i) Drug testing results
 - ii) Therapy reports
 - iii) Workplace monitor reports
 - iv) Check-in calls
 - v) Meeting attendance reports
 - vi) PHP monitor reports
 - vii) Monitoring agreement and amendments have been signed
 - b. If these items are not in compliance, send letter 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 chart relapse behavior to the attention of PHP staff.
7. Consult with PHP staff about case management issues as needed.
8. Communicate with treatment centers and therapy providers to obtain status/progress reports on participants.
9. Participate in the presentation of monitoring agreements to new participants in conjunction with the Medical Director and/or other PHP staff.
10. Review and recommend action on check-in call requests, discussing with other case managers, program director, medical director, case management supervisor and other staff as necessary.
11. Participate in case conference review involving medical director and all other staff.
12. Assist in maintaining the PHP database to assure that it is up to date and suggest any corrections to facilitate data entry.
13. Engage in participant advocacy via telephone calls, drafting letters, and other means as needed.
14. Participate in PHP committee meetings by presenting cases, research, and engaging with committee members and other stakeholders.
15. Identify and pair PHP monitors for new participants and assign new monitors for participants who have relocated.
16. Review discharge summaries and evaluation reports and initiate next steps.
17. Review and enter into database all reports (therapy, medication management, PHP monitor, and workplace monitor). Bring concerns to case conference and complete agreement amendments as needed.
18. Market the PHP program during external conferences and House of Delegates as assigned (this may include occasional weekend work 1-2 times a year).
19. Safeguard participant confidentiality by following federal and state confidentiality laws.
20. 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
- 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: 04/30/2023

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.