



TITLE: CASE RESOURCE SPECIALIST I

FLSA: Non-Exempt

BOARD APPROVED: January 28, 2025

BARGAINING UNIT: Misc.

DEFINITION

Under direct supervision, provides support and services designed to ensure effective, quality mental health services and treatment for clients of the Health Services Agency. Serves as an advocate for clients in various daily living situations. Handles routine case management services.

SUPERVISION RECEIVED AND EXERCISED

Receives direct supervision from assigned supervisory or management personnel. No direct supervision of staff is exercised.

CLASS CHARACTERISTICS

This is the entry-level class in the Case Resource Specialist series that perform a variety of functions in the Mental Health Division. Responsibilities may differ, depending upon the department/division to which assigned. The ability to be promoted to the Case Resource Specialist II classification is dependent upon the demonstration of the skills necessary to effectively deal with numerous complex cases as determined by the Mental Health Director. This class is distinguished from the Case Resource Specialist II in that the latter must be eligible for certification as a Mental Health Rehabilitation Specialist per Title 9, Division I, Chapter 3, Article 8, Section 630 of the California Code of Regulations and performs the essential functions at a complex level including rehabilitative services.

EXAMPLES OF ESSENTIAL FUNCTIONS (Illustrative Only)

- Meets with clients and consults with service providers on a regular basis to ensure the proper implementation of case management plans and to monitor case progress.
- Refers clients to and/or coordinates care plans with other private or public mental health and medical service providers and support programs as appropriate.
- Provides information and support regarding medication compliance, money management, problem solving, and other daily living skills. May coordinate residential placement, transportation, and other daily living functions for clients as necessary.
- Performs concurrent and post-discharge utilization review of inpatient psychiatric stabilization for continuum of care and billing documentation.
- Assists adult/children's outpatient team with service authorization determinations.
- Performs case management evaluations and recommendations.
- Meet department standards for productivity related to third party reimbursement.
- Assists nursing and Community Health Worker staff ~~psychiatric aide staff~~ with client and clerical tasks in Crisis Intervention Clinic as needed.

- Provides assistance to clients in obtaining and maintaining all eligible benefits that are necessary to assure continuity of care and to provide the least restrictive level of care to clients.
- Prepares and maintains accurate and complete case documentation; prepares related reports as required.
- Ensures complete, accurate case documentation as required by State and County regulations and standards.
- Attends training sessions, conferences, meetings, etc., to enhance job knowledge and skills.
- Performs various administrative duties, including answering the telephone, compiling data, preparing reports and correspondence, copying and filing documents, procuring supplies, attending meetings, etc.
- Responsible for assigned vehicle, reporting maintenance issues to appropriate agency staff.
- Will meet department standards for productivity and related documentation requirements for third party reimbursement.
- Reports documented or suspected abuse and neglect as mandated by law.
- Compliance with all provisions of the Health Insurance Portability and Accountability Act of 1996 (HIPAA) if assigned to Health Services Agency.
- Compliance with all relevant laws and regulations regarding confidentiality.
- Performs related work as required.

QUALIFICATIONS

Knowledge of:

- Applications of mental health principles and treatment;
- Casework and interviewing techniques;
- Available community resources;
- Applicable Federal, State, County, Department, and Division laws, regulations, policies and procedures;
- Modern office practices, methods and computer equipment;
- Record keeping principles and procedures;
- Computer applications related to the work;
- English usage, grammar, spelling, vocabulary, and punctuation;
- Working knowledge of medications and general health care;
- Recovery model principles;
- Techniques for dealing effectively with the public, vendors, contractors and County staff, in person and over the telephone;
- Techniques for providing a high level of customer service to public and County staff, in person and over the telephone.

Ability to:

- Develop effective case plans for clients;
- Develop, identify and coordinate services;
- Establish rapport with mentally or emotionally disturbed clients;
- Make sound, educated decisions;
- Maintain significant flexibility in daily operations and decision making;
- Read and interpret technical materials pertaining to the responsibilities of the job;
- Maintain routine records;
- Communicate effectively in written and oral form;

- Assemble and analyze information and prepare written reports and records in a clear, concise manner;
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities and meet critical time deadlines;
- Operate modern office equipment including computer equipment and specialized software applications programs;
- React calmly and professionally in emergency, emotional and/or stressful situations;
- Establish and maintain effective working relationships with those contacted in the course of the work;
- Work independently and as a team member.
- Successfully complete an extensive and thorough law enforcement background investigation and maintain clearance while employed in this classification, if assigned to the jail

Education and Experience:

Any combination of training and experience which would provide the required knowledge, skills and abilities is qualifying. A typical way to obtain the required qualifications would be:

- Graduation from an accredited college or university with an Associates Degree in a health or social services related field.
- One (1) year experience working with mental health clients or other special needs populations preferably in a County Mental Health system.
- Other combinations of education and experience may be considered.

License and Special Requirements:

- Possession of, or ability to obtain and maintain, a valid California Class C driver's license and a satisfactory driving record is required. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.
- Must possess or be willing to obtain a National Provider Identifier (NPI).
- May be required to successfully complete an extensive and thorough law enforcement background investigation.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various County and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone. This is primarily a fieldwork classification that requires standing and walking between work areas. This position may require stamina for long distance or all-day driving of vehicle. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard, typewriter keyboard, or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects, up to 30 pounds, as necessary to perform job functions.

WORKING CONDITIONS

Employees work in an office environment and primarily in the field with moderate noise levels, limited controlled temperature conditions, and potential exposure to hazardous physical substances. Tasks may require exposure to illness/disease, work related stress and hostile clients. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures. Employees may work varying shift schedules including nights, weekends, and/or holidays.

**EQUAL OPPORTUNITY EMPLOYER / AMERICANS WITH DISABILITIES ACT
COMPLIANT / VETERANS' PREFERENCE POLICY / DRUG-FREE WORKPLACE**

(10/21/08)