



Approved by: BLW

Supervisor Review by: GB

Approval Date: 9-30-17

Review Date: 8/24/17

**Job Title:** Case Specialist

**Status of Employment:** Non-exempt/Hourly

**Department/Location:** Employment Services

**Reports To:** Director of Services

**Position Summary:** Assist customers with the completion of the intake process, assess needs and develop service plans to overcome barriers. Engage customers during intake process and establish a trusting & collaborative relationship. Coordinate and establish supports with team members, make referrals to outside agencies and provide ongoing follow-up and assessment to ensure customer's goals are met.

**General Purpose:** Case management, customer orientation, coordination of services & ongoing support

**Position Responsibilities:**

- Conduct intake & related assessments with customers; provide orientation to customers as directed
- Coordinate services as written in the service plan among team members and outside organizations to ensure customers' needs are met
- Assist with development & monitoring of goals/requirements within the customers' service plan
- Initiate referrals to outside providers to assist customers in attaining support services as needed
- Advocate for customers' rights to assist them to achieve personal goals
- Assist with other customer and/or office needs when team members are absent
- Work collaboratively with members of the team to ensure customers' needs are met
- Complete documentation requirements daily or as directed by company policies and procedures
- Know, understand, implement, and adhere to all Community Options, Inc. policies and procedures
- Related duties as assigned to include, but not limited to, completion of job responsibilities identified for other team member positions, as directed

**Essential Skills and Experience:**

- Bachelor's degree in social work, human services, vocational rehabilitation or related field preferred; additional work experience may be considered in lieu of degree
- Two (2) years of work experience in a related field
- Completion of Career Development Facilitator (CDF) training with ND Department of Career and Technical Education (NDCTE), as directed
- Strong communication, customer service, organizational, and networking skills
- Proficient computer skills including knowledge of Microsoft Office 365
- Valid driver's license, acceptable driving record, reliable transportation, and proof of insurance for the vehicle subject to the statute of the licensing state will be required based on assigned job duties

**Other Skills and Experience:**

- Team player and knowledge of community resources



- Maintain a professional manner at all times with customers and in the community when representing the company

**Reporting to this position:** None

**Physical Demands and Work Environment:** The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.

- Physical demands: While performing the duties of this job, the employee is required to walk; sit; use hands to finger, handle or feel objects, tools or controls; reach with hands and arms; balance; stoop; talk or hear. The employee must occasionally lift and/or move objects weighing up to 50 pounds. Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.
- Work environment: While performing the duties of this job, the employee will be in an office or community setting. Assigned work shifts will vary depending on the customers' or company needs; employee must be flexible to work mornings, afternoons, evenings, overnights, holidays, and weekends at one or more locations as determined by the customers.

**Acknowledgement and Sign-off:** The statements above are intended to describe the general nature and level of work performed by individuals assigned to this position. The job description is not an exhaustive list of the knowledge, skills and abilities required for the position. All employees may be required to perform duties outside of the normal responsibilities as needed. The employee is expected to adhere to all company policies and to act as a role model in the adherence to those policies. Failure to adhere to company policies and the job description may result in disciplinary action, up to and including termination. The job description may be changed at any time, with or without advance notice to the incumbent employee.

I have read and understand this explanation and job description.

**Name (Print):** \_\_\_\_\_

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Replaces Position:** Employment Specialist I, II and III