



Competency/Skills Self-Appraisal: Case Manager

Name _____ Date _____

Please check the column that applies to your skill level:
 3= Very Competent > 1yr Exp. 2=Some Help needed <1 yr. Exp. 1=Need Direction <6 months Exp. 0=Never Done

SKILLS	3	2	1	0	SKILLS	3	2	1	0
▪ BCLS Expires: _____					▪ Integrated Delivery Services (IDS)				
▪ RN Expires: _____					▪ Transitional Care				
▪ LPN Expires: _____					▪ Independent Case Manager				
▪ BSW Expires: _____					▪ Discharge Planner				
▪ MSW Expires: _____					▪ Care Management				
▪ CCM Expires: _____					▪ Case Management				
▪ Other Certification (specify): _____					▪ Utilization Review				
▪ Computerized Charting System (specify) _____					▪ Telephonic				
1. AGE SPECIFIC PRACTICE CRITERIA:					▪ Risk Management				
▪ Newborn/Neonate (birth to 30 days)					4. GENERAL SKILLS:				
▪ Infant (30 days to 1 year)					▪ Charting/Documentation/Consents/Care Plans				
▪ Toddler (1 -3 years)					▪ Confidentiality of Information/HIPAA				
▪ Preschooler (3-5 years)					▪ Ordering Supplies				
▪ School Age Children (5-12 years)					▪ Universal Precautions/Infection Control Procedures				
▪ Adolescent (12-18 years)					▪ Advance Directives				
▪ Young Adults (18-39 years)					▪ JCAHO – National Patient Safety Guidelines				
▪ Middle Adults (39-64 years)					▪ Manage stress appropriately				
▪ Geriatric (64 +)					▪ Ability to handle multiple priorities				
2. EXPERIENCE WITH AGE GROUPS:					▪ Manages anger/fear/hostility/violence of others appropriately				
▪ Able to adapt care to incorporate normal growth and development					▪ Processes for minimizing security risks				
▪ Able to adapt method and terminology of patient instructions to their age, comprehension and maturity level					▪ Knowledge of Hazmat				
▪ Ensures safe environment reflecting specific needs of various age groups					▪ Patient rights and responsibilities				
3. EXPERIENCE IN SETTINGS:					▪ Resolution of ethical issues				
▪ Acute care hospital					▪ Restraint policy				
▪ Community					▪ Alternatives to restraints				
▪ Disability					▪ Occurrence reporting				
▪ Insurance					▪ Identify and report sexual abuse				
▪ HMO					▪ Identify and report child abuse				
▪ PPO					▪ Identify and Report elder abuse				
▪ Legal/Attorney					▪ Use of appropriate PPE				
▪ Rehab					▪ Sentinel events – inpatient suicide				
▪ Vocational Rehabilitation					▪ Sentinel events – bed entrapment death				
▪ Hospice					5. CASE MANAGEMENT COMPETENCIES:				
▪ Nursing					▪ Knowledge of state and federal regulations				
▪ Home Health					▪ Knowledge of PRO,HCFA, HRS regulations				
▪ Worker's Compensation					▪ Assess patient/family financial resources				
▪ Health and Human Services					▪ Make referral to appropriate community resources				

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5. CASE MANAGEMENT COMPETENCIES CONTINUED:					▪ Gynecology				
▪ Prioritize patient discharge planning needs/problems					▪ NICU				
▪ Pain management intervention					▪ Labor and Delivery				
▪ Utilize Patient/family teaching from admission to discharge					▪ Emergency Department				
▪ Participate in formal daily collaborative discharge planning					▪ Rehabilitation unit				
▪ Participate in daily social service rounds					▪ SNF				
▪ Assess patient specific psychological/social/environmental/cultural needs as it impacts on patient response to care					▪ Psychiatric				
▪ Identify patient/family/caregiver psychosocial needs in collaboration with other disciplines					▪ Intermediate care				
▪ Contribute to ongoing education relevant to psychosocial needs					▪ Telemetry/Step down/PCU				
▪ Integrates psychosocial needs assessment into discharge plan									
▪ Assess, collaborate, coordinate discharge planning needs and readiness for discharge with other member of health care team									
▪ Liaison with community agencies									
▪ Liaison with sub acute skilled facilities									
▪ Liaison with long term care facilities									
▪ Liaison with other health care facilities									
▪ Coordinate requests for clinical information to third party payers									
▪ Work with outside reviewers									
▪ Work with physician advisors									
▪ Resolution of denial of care conflicts									
▪ Ensure appropriate patient care and clinical information is exchanged at patient admission/referral/transfer/discharge									
▪ Utilization review data entered in medical record									
▪ Discharge planning information entered in medical record									
▪ Access of patient information following HIPAA guidelines									
▪ Current Interqual Criteria									
▪ Knowledge of Milliman and Robertson Criteria									
▪ Knowledge of PRO									
▪ Over utilization of services									
▪ Under utilization of services									
▪ Knowledge in assigning Possible Avoidable Days									
▪ Knowledge of utilization review process									
▪ Admission concurrent and D/C reviews									
▪ Referral of suspected abuse/neglect/exploitation									
▪ Observation hours									
▪ Tally of observation hours									
▪ Use of copier/printer/fax/computer									
6. CLINICAL KNOWLEDGE:									
Clinical knowledge and expertise to effectively apply case management for:									
▪ Medical									
▪ Surgical									
▪ Oncology									
▪ Psychiatric									
▪ Pediatrics									
▪ Critical care – adult									