Position: Case Manager	
Department: Case Management	
Reports to: Co-Directors of Case Management	
Status: Non-Exempt	**Hours: 40**
Date: 11/2026	**Approved: Casey Winterson**

Job Function: Case Managers and Information & Assistance Field Specialists support older Vermonters in the community to stay as independent as possible in the environment of their choice by promoting health, rights, independence, and economic well-being. They are responsible for field-based, direct provision Person-Centered Options Counseling and Care Coordination to clients in our 54-town service area.

Essential Functions:

1. Assess the needs of those individuals who have made initial contact with CVCOA, requesting information or assistance, using the Independent Living Assessment, a person-centered Options counseling intake, and the "my options" plan.
2. Provide Options Counseling to help consumers, and their advocates, direct their own decision-making and planning.
3. Perform necessary follow-up paperwork for client contacts, including monthly client records, completion of applications, advocacy, etc.
4. Complete independent living assessment if appropriate for the individual on the Choices for Care and Moderate Needs program. These programs work with individual's that are 18+.
5. Paperwork and Documentation: Utilize SAMS database for documenting client records, independent living assessments, shared decision plans and Medicaid Waiver billing. The SAMS database also tracks all our statistical data.
6. Make referrals to other internal and external agency services as needed.
7. Provide coverage for office-based Information and Assistance (I&A) Specialist and SHIP (Medicare Part D back-up) coverage for State Health Insurance Program (SHIP) Coordinator.
8. Represent agency at collaborative meetings with community partners.
9. Gather data and complete quarterly 3SquaresVT Outreach Specialist reports, including statistical and narrative sections (this may be shared with and/or handled by other I&A Outreach Specialist).
10. Attend relevant trainings, all-staff meetings, and all Case Management department staff meetings.
11. Systems Advocacy: to identify needs for systems change and participate in actions to improve service systems for older Vermonters.

Knowledge, Skills and Abilities:

1. BA preferred or an equivalent combination of education and experience; preferably in human service/social services.

2. Knowledge of or familiarity with issues, needs and community, state, and federal programs relevant to older persons and/or low-income persons, including long term health care issues.
3. Excellent verbal and written communication skills, including sensitivity, listening, problem solving, and teamwork.
4. Basic math skills and ability to do complex paperwork.
5. Solid computer skills and comfort with learning and using new and pertinent database systems. Systems used include Windows Environment, Internet-based database systems, MSOffice, SAMS, and others.
6. Judgment, intuition, commitment, and perseverance to resolve client issues.
7. Ability to be non-judgmental and to work with a wide variety of people; ability to keep confidentiality; reliability; honesty.
8. Ability to work independently and be self-motivated.
9. Ability to be an advocate for a vulnerable population, to effectively navigate through bureaucracy to meet clients' needs.

Additional Desirable Qualifications (*optional):*

1. 2-4 years' work experience in human services, preferably with older persons or people with disabilities 18+.

Physical Demands:

1. Ability to travel within 3-county area in a variety of weather conditions. (reliable transportation needed).
2. Ability to traverse varied terrains and entrances to client homes in a variety of weather conditions.
3. Ability to interview clients in a variety of environmental conditions.
4. May require lifting to 25 pounds.

Mental Demands:

1. Attention to deadlines.
2. Ability to multi-task.
3. Ability to understand complex social service programs.
4. Ability to self-manage.
5. Ability to handle multiple and un-planned activities and schedule changes.

Working Conditions:

1. Independent/solitary work as well as work within an office and group setting.
2. Exposure to and ability to deal with unsanitary living conditions and a wide variety of people.
3. Travel within 3-county area during all seasons.
4. Private or shared office space in central or satellite office, depending on territory.