

**Working with Case Managers**  
Video Series: Part 1

# Understanding Case Management



# Introduction

Many people work with case managers. They play an important role in support coordination. Case managers support you in getting the services you need.

Sometimes it is hard to understand what exactly case managers do. This video is designed to help you understand the role of case management.



# Who are case managers?

**Case managers** are health and human services workers who coordinate other people's health and social care.

They help people obtain services and make decisions about their care.

If you receive a variety of services, you may have different case managers for different services.



There are many names for people who are case managers.

Common job titles for case managers include...

Care coordinators

Care managers

Service coordinators

Support coordinators

Rehabilitation  
counselors

Case workers

Access specialists

Patient navigators

... and others.





# The Working with Case Managers Video Series



<https://www.fddc.org/resources/#guide>

## The “Working with Case Managers” guide can help you understand what to expect from your case manager.

It includes:

**A list of key skills and responsibilities**

**Surveys designed for people who use services and their caregivers**

**A worksheet to help you share feedback**

### **WORKING WITH CASE MANAGERS**

**A guide for people with disabilities and caregivers**



# Key skills of case managers



**1**

**Positive Relationship  
Building**

**2**

**Effective  
Communication**

**3**

**Professionalism**

**4**

**Support and Service  
Facilitation**

**5**

**Support Team  
Coordination**





# Positive Relationship Building



# Positive Relationship Building

Respects  
people's  
background and  
life experiences

Builds rapport

Supports decision  
-making

Incorporates  
feedback



# Positive Relationship Building

## Respects people's background and life experiences

Case managers respect all people regardless of their culture, life experiences, or disabilities.





# Positive Relationship Building

## **Builds rapport**

Case managers have good relationships with the people they work with. They build trust so participants and caregivers feel comfortable asking them for help.





# Positive Relationship Building

## Supports decision making

Case managers help participants set goals and make informed decisions.



# Positive Relationship Building

## Incorporates feedback

Case managers ask participants and caregivers for feedback and make changes based on this feedback.







# Effective Communication



# Effective Communication

Communicates  
clearly

Listens  
generously

Checks for  
understanding



## Communicates clearly

Case managers are clear communicators and easy to understand.



## Listens generously



Case managers are good listeners. They encourage participants and caregivers to share their thoughts, feelings, and needs.



# Checks for understanding

Case managers check that participants and caregivers understand what was discussed. Case managers also ask questions to make sure they understood what participants and caregivers tell them.







# Professionalism

Skill 3



# Professionalism Skills



Skill 3

1

## Explains roles and responsibilities

Case managers tell participants and caregivers what to expect from them.

2

## Prioritizes and responds in a timely way

Case managers respond promptly to participant and caregiver requests. They prioritize and respond immediately to emergencies.

3

## Is reliable

Case managers do what they say they will do.

4

## Addresses questions and issues as they arise

Case managers answer questions and find a way to solve problems.

5

## Completes administrative tasks

Case managers complete paperwork correctly and on time.

Skill 4

A photograph of a classroom setting. A man in a green polo shirt is leaning over a desk, assisting a male student in a red shirt who is looking down at his work. In the foreground, a female student in a pink shirt is looking towards the man. Other students are visible in the background, some working at desks. The room has large windows and blue storage units.

# Support and Service Facilitation



# Support and Service Facilitation

Assess  
participant's  
support and  
service needs

Educates  
participant and  
caregiver about  
support and  
service options

Helps provide  
access to  
supports and  
services

Monitors supports  
and services

## Skill 4

# Assesses participant's support and service needs



**Case managers are good at finding out what participants need to improve their quality of life and to become more independent.**

**Support and Service Facilitation**



## Skill 4

# Educates participant and caregiver about support and service options



**Case managers know about supports and services in the community.**

**Case managers educate participants and caregivers about their choices.**

**They help participants and caregivers anticipate potential response times, outcomes, and next steps when they interact with providers or support services.**

**Support and Service Facilitation**



## Skill 4

# Helps provide access to supports and services

**Case managers help participants apply for programs and services. If needed, they advocate on their behalf.**



**Support and Service Facilitation**



# Monitors supports and services

**Case managers make sure participants receive safe, high-quality supports and services.**





# Support Team Coordination



Skill 5

# Support Team Coordination

Develops  
relationships with  
the support team

Coordinates the  
support team's  
roles and  
responsibilities

Helps ease  
transitions



# Develops relationships with the support team

Case managers get to know the health care and social services professionals (the support team) who work together to provide services to participants.





# Coordinates the support team's roles and responsibilities

Case managers make sure members of the support team each do their part and work together to support participants' goals.



# Helps ease transitions

When participants' needs change, case managers work with the support team to switch participants to supports and services that meet their new needs.



# Review

## The five key skills of case managers are:

**Positive Relationship Building**

**Effective Communication**

**Professionalism**

**Support and Service Facilitation**

**Support Team Coordination**



# Review

Thank you for watching  
**Understanding Case  
Management.**

**Share feedback about this video by:**



## Review

Watch Part 2 of the  
**Working with Case Managers**  
video series to learn about a  
survey that helps you  
understand how well your case  
manager is doing at their job.



This video was developed for:



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