**Section 220.605 Case Management Staff Requirements and Qualifications**

The agency shall have sufficient staff to perform all activities and to fulfill all responsibilities outlined in 89 Ill. Adm. Code 230.Subpart G and 89 Ill. Adm. Code 240.Subpart N for which a contract/grant is in effect.

a) Case Management Supervisor

1) Case management supervisor activities shall include:

A) consultation on case management activities as needed to provide proper supervision;

B) documented provision of training on Illinois Department on Aging and Area Agency on Aging policies, procedures and case management techniques, including those specified in 89 Ill. Adm. Code 240.1440; and

C) annual written performance evaluation of case managers for whom they serve as supervisor.

2) Case management supervisor minimum qualifications shall:

A) Both:

i) be an RN, or have a BSN, or have a BA/BS degree in health or social sciences, social work, or health service administration; and

ii) have at least two years experience in health or human services. This experience shall include one year of supervisory experience or program experience, which is defined as assessment, provision, and/or authorization of formal services for the elderly; or

B) be waived for persons hired/serving in this capacity prior to December 13, 1991.

b) Case Manager

1) Case manager activities shall include:

A) administration of the appropriate intake form, including a comprehensive needs assessment;

B) development of a case plan;

C) making appropriate referrals and responding to applicant/client requests;

D) authorization of services; and

E) maintaining case records, including documentation of follow-up, reassessment, and termination.

2) Case manager minimum qualifications shall:

A) be an RN, or a BSN, or have a BA/BS degree in social science, social work or related field. One year of program experience, which is defined as assessment, provision, and/or authorization of formal services for the elderly, may replace one year of college education up to and including four years of experience replacing a baccalaureate degree; or

B) be a LPN with one year of program experience which is defined as assessment of and provision of formal services for the elderly and/or authorizing service provision; or

C) be waived for persons hired/serving in this capacity prior to December 13, 1991.

c) Case management supervisors and case managers shall meet all training requirements as specified in 89 Ill. Adm. Code 240.1440.

d) The agency may utilize case aides, operating under the direction of the case manager, with supervision provided by the case management supervisor, to assist with specified back-up case management activities, including collateral visits, intake/referrals, program information and paperwork verifications.

1) Case aides shall be trained by the case manager and/or the case management supervisor.

2) Case aides shall not perform assessments, develop case plans, or authorize services.

3) The case manager shall retain responsibility for all case aide activities related to case management.

4) The agency shall ensure that activities assigned to the individual case aide do not exceed that case aide's level of education, experience and training.

(Source: Amended at 22 Ill. Reg. 3426, effective February 1, 1998)