

# Case Manager Training Process 2009

When a case managing agency submits appropriate documentation to DAIL, we will provide the agency with a Certificate of Completion of Case Manager Training for those case managers who have successfully completed both the Case Manager Certificate Core Training and Agency Orientation.

A) *Successful completion* of the Case Manager Certificate Core Training requires:

1. Attending and participating in each training module and
2. Obtaining a certificate of attendance for each module.

B) *Successful completion* of Agency Orientation requires:

1. Completion within 18 months from the date of hire, and
2. Each topic within the Agency Orientation must be dated with a completion date and verified (initialed) by the Case Manager's supervisor.

The Case Manager Certificate Core Training includes the following 10 modules:

CFC 101;

APS/OPG/Self Neglect;

Community Health Care and State Health Care Programs;

Long Term Care Medicaid Part 1;

Long Term Care Medicaid Part 2;

Medicare and Supplemental Insurances with SHIP, SMP, MAP and Office of Long Term Care Ombudsman;

State and Federal Housing Programs;

SSI/SSDI;

Mental Health/Older Adult Mental Health Issues, and

Obtaining Comprehensive Assessments.

Agency Orientation must include the following segments and topics:

- **Case Management Expectations**
  - Referrals and office contact
  - Case management functions
  - Role of the case manager
  - Boundaries and collaboration
  - Record keeping
- **Self Neglect**
  - Identifying at risk clients
  - Competency
  - Using community resources

- **Protective Services / Abuse /Exploitation – Agency policy/protocol**
- **Service and Programs** – It is preferred that case management agencies contact each of the entities below to arrange for case managers to receive training directly from each of the service and program providers.
  - VT Senior Citizen Law Project
  - VT Ethics Network
  - Home Health Agency Services
  - Hospice and Palliative Care
  - Adult Day Programs
  - Community Action Agencies
  - VT Center for Independent Living (VCIL)
  - Nursing Homes and Residential Care Homes
  - Personal Emergency Response Systems
  - Senior Employment Programs and Unemployment Benefits
  - Mental Health Services / Eldercare Clinicians
  - Transportation
  - Veterans Services
  - Senior Companion Program
  - Dementia/Caregiver Support Services
  - Private Duty Programs
    - Caregiver Registry - Local and Online
    - Non-medical providers
  - Wellness Programs
    - Healthy Living
    - Bone Builders
    - Heart Association
    - Smoking Cessation
- **Community Living/ Disability Resource Connections**
  - Senior Help line and 211
  - VCIL Accessibility Funding
  - ADRC
- **Housing – at a local level**
  - Rural Housing,
  - Local Land Trust,
  - Subsidized Housing,
    - Section 8
    - Local and State Housing Authorities
  - HASS
- **Nutrition Services**
  - Nutritional Consults
  - Food Shelves
  - Commodities
  - Meals on Wheels
  - Congregate Meal Sites

- **Flex Funds and other localized funding**
  - Local Waiver Teams / Long Term Care Coalition
- **Choices for Care Overview**
  - Home based High / Highest Needs
  - ERC,
  - Flexible Choices,
  - Moderate Needs
- **Attendant Services Program**
  - General Fund
  - PDAC funding
- **Gerontology 101**
  - Chronic Conditions
  - Aging Process
  - Working with dementia and Alzheimer's Disease and other related diseases
  - Aging in a family system
- **Public Benefits**
  - Fuel
  - 3Squares VT
  - Community Medicaid
- **Supervision, Training and Follow Up**
  - In the office
  - In the field
  - Training
- **Overview of Department of Disability, Aging and Independent Living**
  - Who's Who
  - Website
  - Programs
  - Oversight responsibilities
  - SAMS database
  - Reporting
- **Other local formal Networks**
  - Support Groups
  - Church Groups
  - Mediation Programs
- **Home Accessibility/ Modifications**
  - Reasonable Accommodations
  - Local Network / resources
  - Procedure for access

- **Durable Medical Equipment**
  - Guidelines to obtaining Medicare coverage
  - Lift Chairs,
  - Local Vendors
  - Procedures for access
  - MAPS
  - Assistive Technology – Vermont Assistive Technology Program
  
- **Low Cost Loans**
  - USDA
  - Opportunities Credit Union [www.oppsvt.org](http://www.oppsvt.org)
  
- **Legal Issues**
  - Vermont Ethics Network
  - DPOA
  - Guardianship
  - Advance Directives
  - Financial Planning