

**DEPARTMENT:** MENTAL HEALTH  
**CLASSIFICATION:** COMPETITIVE  
**APPROVED:** MARCH 18, 2025

**CASE MANAGER - MENTAL HEALTH SERVICES**

**DISTINGUISHING FEATURES OF THE CLASS:** The position involves the assessment of the need for mental health and related support services for applicants and current mental health services clients, and makes referrals as appropriate for: housing, shelter, treatment, Assisted Outpatient Treatment (AOT), Single Point of Access (SPOA) services, and community-based services. The incumbent performs client case management activities consistent with Office of Mental Health and related program guidelines, requirements and objectives in order to ensure the client is aware of, receives, and engages with the necessary support from available internal and community programs to achieve self-sufficiency. The work is distinguished from the duties of licensed staff in that incumbents are excluded from providing diagnosis, psychotherapy, and other medical services. The incumbents are limited to providing case management, crisis intervention, skills development, referrals/linkage, and other non-medical services. Work is performed under the general supervision of a Senior Licensed Clinician, Staff Social Worker, or higher level supervisory staff with wide leeway for the exercise of independent judgment in carrying out the work in accordance with established laws, rules, regulations, policies, and procedures. Does related work as required.

**TYPICAL WORK ACTIVITIES:**

1. Interviews and assesses (in-person and/or via telehealth) applicants and mental health services clients to gain an understanding of their needs and goals and evaluate how these match the objectives and eligibility requirements of the funded programs;
2. Conducts interviews for individuals in crisis, including through participation in the on-call mobile crisis team, to determine appropriate level of case, including possible hospitalization;
3. Provides education to applicants and clients regarding various program/service eligibility, referral processes, requirements for participation, client rights and responsibilities, and decision appeal processes;
4. Interviews participants to assess and prioritize need for integration of support services provided by or through internal units or community agencies; provides referrals/linkages to necessary emergency assistance services;
5. Maintains a roster of clients for whom they are responsible for ensuring appropriate service linkages;
6. Completes Individual Service Plans including for referrals to additional skills training, peer/social support, educational, vocational or employment related activities in order to support the achievement of health, wellness and self-sufficiency;
7. Conducts individual, group, and/or family education, skill-building, and counseling sessions for clients;
8. Conducts outreach, establishes and maintains a relationship with each client in order to facilitate engagement in needed services, initiate referrals, follow up, monitor and reassess service needs as client circumstances change, and closely monitor self-sufficiency progress;
9. Collaborates with department programs and community agencies to ensure knowledge of available program services throughout the community and to advocate on behalf of clients;
10. Prepares reports as requested by the department, regional or state central offices; reviews status reports for applicants and clients, and coordinates with internal staff and external agencies to assist clients to enroll in the appropriate employment, housing, and related programs;
11. Documents case activity and prepares and assists in the preparation of various reports on program activities;
12. Facilitates routine meetings and case conferences to ensure linkage to needed services, monitor progress, and advocate on behalf of individual clients, families and systems;
13. Maintains electronic files on a computerized electronic health record system;
14. Participates as part of the Mobile Crisis Team.

**CONTINUED**

## **CASE MANAGER - MENTAL HEALTH SERVICES (CONTINUED)**

**FULL PERFORMANCE KNOWLEDGES, SKILLS, ABILITIES AND PERSONAL CHARACTERISTICS:** Good knowledge of the goals, guidelines and application of mental hygiene programs; good knowledge of federal, state, and local mental hygiene laws, regulations and programs as they affect eligibility for programs, services, and assistance; good knowledge of interviewing and counseling techniques and principles; working knowledge of community services delivery agencies, eligibility criteria, and the referral process; good verbal and written communication skills; computer skills; ability to use modern office software applications including word processing, spreadsheets, and data bases at an acceptable rate of speed and accuracy; ability to compile and analyze data and prepare reports; ability to work effectively with public and private agencies and with the general public; ability to establish and maintain relationships and professional boundaries; good power of observation; tact and courtesy; initiative and resourcefulness; sound professional judgment and integrity; emotional maturity and good mental condition; willingness to work varying hours and weekends when necessary; physical condition commensurate with the demands of the position.

### **MINIMUM QUALIFICATIONS:**

1. Graduation with a Bachelor's Degree and two (2) years case management or crisis services experience working in a mental health, alcohol or drug abuse setting, or related setting where responsibilities directly involve working with mental health and/or addiction related issues or social casework\* concerns; OR
2. Graduation with an Associate's degree and four (4) years case management or crisis services experience working in a mental health, alcohol or drug abuse setting, or related setting where responsibilities directly involve working with mental health and/or addiction related issues or social casework\* concerns; OR
3. An equivalent combination of education and experience as defined by the limits of (1) & (2) above.

### **SPECIAL REQUIREMENTS:**

Possession of a valid New York State driver's license at time of appointment and for the duration of employment.

### **NOTE:**

1. Degrees must have been awarded by a college or university accredited by a regional, national, or specialized agency recognized as an accrediting agency by the U.S. Department of Education/U.S. Secretary of Education;
2. Verifiable volunteer and/or part-time experience will be pro-rated;
3. \*Social Casework includes those activities that are directed toward enhancing a client's abilities to cope with and to solve problems, and referral of clients to supporting resources and services. Functions include client assessment, problem identification, development, monitoring and revision of a plan for services, motivational support, counseling, crisis intervention, referral to social and support services, and coordinator of services.
4. Social Services Worker and Employment & Training Counselor experience is not considered case management and cannot be used to qualify.