

The 2016 Florida Legislature passed s. 394.4573(2)(e), F.S., which states that “each case manager or person directly supervising a case manager who provides Medicaid-funded targeted case management services shall hold a valid certification from a department-approved credentialing entity as defined in s. 397.311(9) by July 1, 2017, and, thereafter, within 6 months of hire.”

The affected positions are:

- Mental Health Targeted Case Management Supervisors, serving the adult or child target populations.
- Mental Health Targeted Case Managers, serving the adult or child target populations.

Before this law passed, the Agency for Health Care Administration (AHCA) established the minimum qualifications for an individual to be certified by AHCA to provide and bill for Medicaid-funded targeted case management services. The new law has transferred this certification process from AHCA to the Florida Certification Board (FCB). *Note: The Florida Certification Board (FCB) is a department-approved credentialing entity department-approved credentialing entity as defined in s. 397.311(9).*

There is no change to agency enrollment or billing with AHCA, EXCEPT personnel must now be certified by FCB, rather than their employer (for case managers) or ACHA (for case manager supervisors).

FCB operates over 30 professional certification programs for health and human service professionals across Florida. The FCB is currently developing a case management certification program in order to meet the requirements of this law. By answering this survey, you are helping us make sure that we correctly define what a case manager and his or her supervisor need to know and be able to do in order to provide effective and efficient services to adults and children eligible for mental health targeted case management services. Your responses will also help determine how many questions are on the certification exam for each core competency.

Please go to the next page for more information on where we are in this process and how you can help.

## Introduction

**Developing a new certification program starts with pulling together a diverse group of people who have a great deal of experience in the field of case management. These people – called subject matter experts (SMEs) – work together to develop a “scope of service” to define the purpose, role, and duties of a case manager, along with the knowledge, skills and abilities necessary to be able to perform the job to a specified level of competency.**

**In the Fall of 2016, the FCB led the Case Management Scope of Service meeting to develop the proposed credential structure and core competencies.**

**We recommend that you review the Case Management Scope of Service Draft Report or the hard copy of this survey, before responding. This will allow you to gain an overview of the program and understanding of the allowances, limitations and expectations of all case managers, regardless of employer or location. Both documents are posted online at <http://flcertificationboard.org/certification/case-management-credentials/>.**

**Please continue for an overview of the proposed core competencies.**

## Credential Structure and its Relationship to the Core Competencies

The SME team was tasked with identifying core competencies for case managers and case manager supervisors, regardless of employer, service delivery model or geographic location. Before diving deep into "what they need to know" the team discussed "what" the resulting credential program could look like. The team agreed that the case management certification program needed to result in two stand-alone credentials: one for a case manager and another for a case manager supervisor. In addition, each credential needed to identify the target population the person was credentialed to serve: adults and/or children eligible for Medicaid-funded targeted case management. The resulting credentials are:

**Certified Case Manager -- Adult (CCM-A)**

**Certified Case Manager -- Child (CCM-C)**

**Certified Case Manager -- Adult & Child (CCM-AC)**

**Certified Case Manager Supervisor -- Adult (CCM-SA)**

**Certified Case Manager -- Supervisor Child (CCM-SC)**

**Certified Case Manager -- Supervisor Adult & Child (CCM-SAC)**

Although the team identified specific education and experience requirements for each credential, they agreed that there would be one set of case management core competencies each certified case manager or case manager supervisor must have.

Please continue.

After developing the credential structure, the team started to discuss competencies following two baseline agreements. The case management credentials had to:

1. meet the statutory definition of case management, and
2. meet or exceed the current case manager and case manager supervisor certification requirements stated in the Florida Medicaid Mental Health Targeted Case Management Handbook.

The legislature defines case management as “those direct services provided to a client in order to assess his or her needs, plan or arrange services, coordinate service providers, link the service system to a client, monitor service delivery, and evaluate patient outcomes to ensure the client is receiving the appropriate services.

The SME team identified 26 core competencies/job tasks that they grouped into five performance domains. They also stated that each certified case manager and case manager supervisor is expected to:

- Perform all job tasks from a client-centered, strengths-based and trauma informed perspective.
- Use soft skills, such as active listening, motivational interviewing, and rapport building in order to engage the client and significant others in the case management process.
- Document all case management activities according to the competencies in the Documentation performance domain.
- Use professional knowledge and skills to determine when and how to conduct job tasks.

Please continue to learn more about the proposed core competencies and your role in this process.

**We are now at the validation stage of the credential development process – also known as, “Did they get it right?”**

**Even though the SME panel has a very good idea of the core competencies expected of a mental health targeted case manager, a valid and reliable credential requires us to ask others in the field to review and validate the work of the panel members.**

**You have been asked to respond to this survey because of your background and experience related to these job tasks. It should take approximately 30 - 45 minutes to complete the survey.**

**Please know that your honest feedback is critical to the success of this project. So much so, that this is an anonymous survey -- we will never know "who" said "what" so PLEASE answer each question as honestly as possible.**

**We have a little more background information and directions for you, before we start the survey. Please continue.**

## Case Management Performance Domains

The following five (5) performance domains have been identified:

1. Engagement and Assessment (Initial and Ongoing)
2. Service Planning and Development (Initial and Ongoing)
3. Coordination, Linkage and Monitoring
4. Documentation
5. Professional, Legal, and Ethical Responsibility

Within each domain, there are a set of tasks that are performed or supervised by a case manager. Across all domains, there are a total of 26 job tasks.

During this survey, you will be asked to rate each job task two times: once for frequency and once for importance. More information on the rating system will be presented in that part of the survey. It is important to understand that the ratings you provide on each job task will be used to determine the percentage of questions that each task will have on the examination. Tasks that are rated as more important and are more frequently performed will have more questions on the exam.

## Survey Overview

**This survey is divided into four (4) sections:**

- In Section A, you are asked to submit demographic information that will ensure the data collected represents professionals working in various settings with differing backgrounds.**
- In Section B, you are asked to evaluate task statements in four domains. These task statements have been identified as required for competent performance as a case manager. You will rate each task statement as to its importance and frequency.**
- In Section C, you are asked to provide a number that represents the percentage of time a case manager spends performing tasks in each of the domains. The five (5) numbers should total 100.**
- In Section D, you are asked to let us know if there was any important information you believe was not included in this survey.**

### **SURVEY DIRECTIONS:**

- 1. You may exit and re-enter this survey at any time as long as you use the same computer. If you cannot complete the survey in one sitting, you may want to print a hard copy of the survey, complete the survey, and enter your ratings at one time.**
- 2. Please carefully review the instructions at the beginning of each section. The rating scale information is repeated for each domain in Section B.**
- 3. The survey data will not be submitted until you complete the entire survey and select the "Done" button.**
- 4. Surveys must be completed no later than September 29, 2017.**

**Please select NEXT to begin the survey.**

## Section A: Demographic Data

**Please provide your demographic information. This information is used to ensure that a representative sample of professionals working in the field responded to the survey.**

\* 1. Are you a member of the Subject Matter Expert panel that identified the core competencies for validation purposes?

Yes

No

\* 2. Gender:

Female

Male

\* 3. Age:

Under 30 years old

41 - 50 years old

31 - 40 years old

Over 50 years old

\* 4. How long have you worked in the field of targeted case management?

Less than 1 year

7 - 9 years

1 - 3 years

More than 10 years

4 - 6 years

\* 5. Which of the following best describes your current job function? Check all that apply.

New Case Manager -- Not certified

Case Manager Supervisor -- Child population

Case Manager -- Adult population

Case Manager Supervisor -- Adult & Child population

Case Manager -- Child population

Agency/Organizational Administrator/Manager

Case Manager -- Adult & Child population

Agency/Organizational Executive Leadership

Case Manager Supervisor -- Adult population

Other (please specify)



\* 6. What is your highest level of education completed? Select only one.

High School Diploma

PhD

Associate Degree

Masters Degree

Bachelors Degree

Juris Doctorate

Other (please specify)

7. Optional Question: Which of the following best describes your ethnicity/race? Select one.

American Indian/Alaska Native

Native Hawaiian/Other Pacific Islander

Asian

White/Caucasian

Black/African American

Other

Hispanic or Latino

## Section B: Domains and Task Statements

The purpose of this section of the survey is to differentiate between the importance and frequency of the tasks relative to each other within each domain. The ratings you provide will be used to determine the percentage of questions that each task will have on the examination. Tasks that are more important and are more frequently performed will have more questions on the exam.

### Directions:

Each performance domain and its associated tasks will appear on the following pages. Please rate each task statement according to the rating scale below.

**Rating for Importance** - For each task statement, ask yourself, "How important is this task, compared to all other tasks in this domain, to the job of the case manager?" Rate each statement according to this scale:

- 1: Not Important
- 2: Somewhat Important
- 3: Important
- 4: Very Important
- 5: Extremely Important

**Rating for Frequency** - For each task statement, ask yourself, "How much time does a case manager spend performing this task as compared to other tasks in this domain?" Rate each statement according to this scale:

- 1: Not Much Time
- 2: A Little Bit of Time
- 3: An Average Amount of Time
- 4: A Fairly Large Amount of Time
- 5: A Very Large Amount of Time

Please keep in mind that every task is not "Extremely Important." It is critical that you rate each task's importance as compared to all other tasks in the domain.

Simply stated, some tasks are MORE important than others. You are NOT being graded, and this is anonymous, so please tell us what you really think.

## Foundational Core Competencies

The SME team felt that there are foundational competencies that help guide the manner with in which a case manager and case manger supervisor should perform all job tasks.

There are four (4) foundational competencies.

### Review of Rating Scales

#### IMPORTANCE

1 Not Important

2 Somewhat Important

3 Important

4 Very Important

5 Extremely Important

#### FREQUENCY

1 Not Much Time

2 A Little Bit of Time

3 An Average Amount of Time

4 A Fairly Large Amount of Time

5 A Very Large Amount of Time

\* 1. Perform all job tasks from a client-centered, strengths based, and trauma informed perspective.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 2. Use soft skills, such as active listening, motivational interviewing, and rapport building when conducting assessment activities in order to engage the client and significant others in the case management process.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 3. Document all case management activities according to best practice, program and legal requirements.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 4. Use professional knowledge and skills to determine when and how to conduct job tasks and meet responsibilities efficiently and effectively.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Domain 1: Engagement and Assessment - Initial & Ongoing (5 Job Tasks)

Tasks in this domain are directly related to engaging the client in services and conducting an assessment to determine the client's individual strengths and needs. These competencies are performed at case initiation and throughout the life of the case to ensure the client continues to be engaged and the plan addresses immediate and relevant needs.

There are 5 job tasks in this domain.

### Review of Rating Scales

#### IMPORTANCE

1 Not Important

2 Somewhat Important

3 Important

4 Very Important

5 Extremely Important

#### FREQUENCY

1 Not Much Time

2 A Little Bit of Time

3 An Average Amount of Time

4 A Fairly Large Amount of Time

5 A Very Large Amount of Time

\* 1. Facilitate the client's understanding of the rationale, purpose and procedures associated with case management services.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 2. Obtain relevant information from the client and meaningful collateral sources in order to assess the client's current situation and identify any immediate needs, including but not limited to the safety and well-being of the client in his or her natural environment.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 3. Administer the appropriate assessment instruments to gather information and initiate a process of shared decision making and goal setting focused on the client's strengths, needs, abilities and preferences.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 4. Analyze and synthesize assessment data in order to identify problems/opportunities that would benefit from case management intervention.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 5. Conduct ongoing assessment throughout the life of the case to identify emerging needs and maintain case relevance.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Domain 2: Service Planning and Development - Initial & Ongoing (4 Job Tasks)

Tasks in this domain are directly related to translating the results of assessment activities into functional services and tasks that address immediate, short-term, long-term and ongoing needs. Tasks in this domain are performed when the initial case plan is developed and throughout the life of the case to ensure the client's service plan is relevant, reflecting the client's current needs.

There are 4 job tasks in this domain

### Review of Rating Scales

#### IMPORTANCE

1 Not Important

2 Somewhat Important

3 Important

4 Very Important

5 Extremely Important

#### FREQUENCY

1 Not Much Time

2 A Little Bit of Time

3 An Average Amount of Time

4 A Fairly Large Amount of Time

5 A Very Large Amount of Time

- \* 1. With the client, translate assessment outcomes into functional domains, prioritize needs under each domain into immediate, short-term, and long-term categories, and identify appropriate case management (vs. clinical) interventions.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- \* 2. Involve meaningful collateral sources/others in initial and on-going case management service planning as appropriate and required.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 3. Develop a written case management plan that reflects assessment outcomes; prioritized and mutually agreed upon needs, measurable goals and objectives, including timeframes; and case management strategies.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 4. Use ongoing assessment and collaboration with the client and meaningful collateral sources/others to review and update the case management plan to reflect emerging needs and maintain relevance.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



## Domain 3: Coordination, Linkage and Monitoring (7 Job Tasks)

Tasks in this domain are directly related to assisting the client to implement the case management plan and monitoring the ongoing effectiveness of the plan in meeting client outcomes. The case manager is expected to facilitate communication and collaboration with the client and meaningful collateral sources/others in order to identify and resolve any barriers, achieve goals and maximize positive client outcomes.

There are 7 job tasks in this domain.

### Review of Rating Scales

#### IMPORTANCE

1 Not Important

2 Somewhat Important

3 Important

4 Very Important

5 Extremely Important

#### FREQUENCY

1 Not Much Time

2 A Little Bit of Time

3 An Average Amount of Time

4 A Fairly Large Amount of Time

5 A Very Large Amount of Time

- \* 1. Identify and maintain information about available community resources and develop a professional networks in order to meet needs and maximize client outcomes.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- \* 2. Make formal and informal referrals to service providers identified in the case management plan.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 3. Conduct ongoing monitoring activities, including contact with the client, concerned others and service providers, to assess the effectiveness of the case plan strategies and measure progress on achieving case plan outcomes.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 4. Use effective facilitation and problem solving techniques to improve communication and relationships between all stakeholders and to reconcile potentially differing points of view.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 5. Advocate for the client to promote individual choice and self-determination

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 6. Assist the client to develop self-advocacy skills.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 7. Appropriately terminate case management services, to include providing reasonable notice; securing client and/or significant other's acknowledgement of and agreement to the case termination; and, if appropriate, effectively and efficiently transitioning the client to the next level of care.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Domain 4: Documentation (5 job tasks)

Tasks in this domain are directly related to documenting service provision according to federal, state and agency requirements and best practices. Documentation competencies apply to all job tasks of a targeted case manager and must be demonstrated from case initiation through case termination/closure. Documentation is a practical as well as legal responsibility, and the upmost care must be taken to professionally document all relevant aspects of care in a manner that provides clear, accurate and comprehensive information as the client record travels with them across providers. Effective documentation not only documents case management outcomes, it also can demonstrate compliance with person-centered, individualized planning.

There are 5 job tasks in this domain.

### Review of Rating Scales

#### IMPORTANCE

- 1 Not Important
- 2 Somewhat Important
- 3 Important
- 4 Very Important
- 5 Extremely Important

#### FREQUENCY

- 1 Not Much Time
- 2 A Little Bit of Time
- 3 An Average Amount of Time
- 4 A Fairly Large Amount of Time
- 5 A Very Large Amount of Time

\* 1. Use best practices for written documentation in order to record all relevant case management services activity and information in a clear, concise, observable/objective, professional and timely manner.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 2. Protect the client's right to privacy and confidentiality according to best practices in preparation and handling of records, especially regarding the communication of client information with third-parties.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 3. Obtain written consent to release information from the client and/or legal guardian according to agency protocols and administrative rules.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 4. Document process, progress and outcome measurements in accord with the client's service plan, assuring a clear linkage between case documentation and the service plan.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 5. Comply with legal, funder and agency documentation requirements and timelines.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Domain 5: Professional, Legal, and Ethical Responsibilities (5 Job Tasks)

Tasks in this domain are directly related to providing legal, ethical and professional services to clients. Tasks in this domain include expectations regarding professional boundaries, use of supervision, on-going professional development, cultural competency and related competencies. Failure to demonstrate these competencies often results in allegations of ethical misconduct and can lead to disciplinary action against the credential.

There are 5 job tasks in this domain.

### Review of Rating Scales

#### IMPORTANCE

1 Not Important

2 Somewhat Important

3 Important

4 Very Important

5 Extremely Important

#### FREQUENCY

1 Not Much Time

2 A Little Bit of Time

3 An Average Amount of Time

4 A Fairly Large Amount of Time

5 A Very Large Amount of Time

\* 1. Follow established professional codes of ethics and standards of practice in order to promote the best interests of the client and the profession.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 2. Perform all job tasks according to professional, ethical and legal standards.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 3. Follow federal, state and other governing rules and regulations in order to promote and protect client rights.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 4. Recognize individual differences of the counselor and client by gaining knowledge about personality, culture, lifestyles, gender, sexual orientation, special needs and other factors that influence client behavior in order to provide case management services that are sensitive to the uniqueness of the individual.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 5. Seek supervision, training and technical assistance as necessary to maintain competence and enhance professional effectiveness.

	1	2	3	4	5
Importance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Section C: Time Percentages for Each Domain

**The purpose of this section is to determine the percentage of time a case manager spends performing duties in one domain relative to the other domains (the last section compared frequency relative to other "task statements" per domain).**

### **DIRECTIONS:**

**Assign the percentage of time you spend OR the percentage of time you believe a case manager would spend performing duties in each of these domains.**

**The total percentage must equal 100%.**

\* 1. Please type in a number for each domain that represents the percentage of time a GAL-CAM spends performing duties in one domain relative to the other domains. All numbers should total 100.

Domain 1: Engagement  
and Assessment (Initial  
and Ongoing)

Domain 2: Service  
Planning and  
Development (Initial and  
Ongoing)

Domain 3: Coordination,  
Linkage and Monitoring

Domain 4: Documentation

Domain 5: Legal, Ethical  
and Professional  
Responsibilities

## Section D: Respondent Feedback

**This section is designed to allow you to provide us with feedback regarding the domains and job tasks that were included in this survey.**

\* 1. How well did this survey cover the performance domains expected of a mental health targeted case manager?

- Very Poorly       Poorly       Adequately       Well  
 Very Well

\* 2. Are there any performance domains you believe were omitted?

- Yes  
 No

If Yes, please explain.

\* 3. How well did this survey cover the job tasks expected of a mental health targeted case manager?

- Very Poorly       Poorly       Adequately       Well  
 Very Well

\* 4. Are there any job tasks you believe were omitted?

- Yes  
 No

If Yes, please explain.

5. Do you have any additional comments?



Thank You!

**This completes the survey.**

**Thank you for taking the time to help validate the core competencies and performance domains for certified case managers and their supervisors. Your feedback is a critical part of developing a valid, reliable and legally-defensible professional credential.**

**We truly appreciate the time and effort you put into answering this survey. Thank you very much for your participation!**