Care Manager/ Supervisor  
Marchi, Smith & Levin  

Under the direction of the owner of Marchi, Smith & Levin (M S & L), an established Fiduciary and Care Management Firm operating since 1985, the Client Care Manager provides supervision of interns, comprehensive assessments, and/or coordinates services to the older adult and disabled populations served by M, S & L in the Bay Area.

The Client Care Manager is experienced and can work effectively supervising interns, and with clients and families across an economic spectrum, including both middle and higher income clients. The Client Care Manager is flexible, client-service oriented, and highly skilled in working with older adults and their families to improve quality of life, ensure a safe home environment, and plan for future needs.

The Client Care Manager understands and assists in meeting service goals, understands the mission and objectives of Marchi, Smith & Levin and works within the limitations of the Firm’s and the clients’ resources and performs all duties in compliance with standards of the Firm.

Job Duties and Responsibilities

1. Networks with the professional community in the Bay Area region by attending local meetings or through targeted outreach in coordination with the M S & L team to better serve our clients.
2. Responds to all clients promptly and sets up, preferably, a home visit or, when appropriate, an office visit.
3. Implements a thorough assessment in the client’s home, which includes completing a goal-oriented care plan to be given to the client and/or his/her family.
4. Provides comprehensive, personalized care management services, based on the assessment and the M S & L protocols for service. Provides a range of levels of care management services based on the intensity of client need and client and/or family preference.
5. Provides supportive counseling and other services as required.
6. Consistently establishes strong relationships and excellent rapport with staff, clients, families, referral sources and other community agencies and resources in the Bay Area to facilitate the care management process.
7. Uses Firm’s electronic record keeping system to complete all charting on a daily basis. Updates care plans on a regular basis in response to changing client needs. Closes case records in a timely fashion, in accordance with the M S & L protocols for service. Complies with all client billing procedures, including accurate timekeeping for program billing purposes.
8. Completes other activities as assigned, including participation in special projects.
Physical Demands

*The physical demands described below are representative of those that must be met by an employee to successfully perform the essential functions of this job.*

1. Sitting, walking, and/or standing for brief periods of time.
2. May be required to encounter clients with infectious diseases or clients receiving radiation therapy.
3. May be required to lift up to 10 pounds.
4. Occasional reaching and/or grasping using hands and/or arms.
5. Regular driving of an automobile.
6. May be required to ascend/descend stairs.
7. Regular use of hands requiring dexterity in using the telephone, computer keyboard or mouse.
8. Visual ability to read documents and computer monitor.
9. Exposure to low to moderate noise levels characteristic of an office or home environment.
10. Required to talk and hear.

Job Qualifications

1. LCSW preferred. MA. in Gerontology, Social Work or Counseling with direct service focus may be substituted. Must be licensed to provide supervision.
2. Five years of experience providing care management to clients preferred.
3. Ability to form relationships with clients and their families required.
4. Ability to use the computer as a tracking and planning tool.
5. Ability to work independently and as part of a team.
6. Must have a car, a current driver’s license and current comprehensive automobile insurance.

*This is initially a project-based position; if we are a good fit for each other there is a possibility for growth.*

Please submit resume and cover letter to Travis Smith at travis@mslfiduciary.com. Please use “Client Care Manager” as your email subject line. We look forward to hearing from you.