



## POSITION SUMMARY

### RN Client Liaison

**REPORTS TO:** Director of Care Management Services      **LOCATION:** Missoula      **FSLA STATUS:** Exempt

#### **POSITION RESPONSIBILITIES:**

The RN Client Liaison will assist Allegiance Case Management in activities related to quality, training, and risk management as it relates to the clients specific needs.

The RN client liaison will evaluate medical care alternatives for cases of illness, injuries or medical/surgical diagnoses that require extensive services and assist Case managers with coordinating needs of members as it relates to the client specific plan language. The RN client liaison will foster positive working relationships, both within Care Management and with Care Management's external customers.

The incumbent is expected to communicate professionally with peers, supervisors, subordinates, vendors, customers, and the public, and be respectful and courteous in the conduct of this position.

#### **ESSENTIAL JOB FUNCTIONS:**

*Essential job functions include the following. Other functions may be assigned as business conditions change.*

1. The client liaison will:
  - Act as intermediary between Care Management Services and the client they are assigned
  - Assist in client specific risk meetings
    - Review clinical updates prior to submission
    - Facilitate meetings as assigned
    - Identify and report client specific needs as they are identified
  - Works collaboratively with the care management team the implementation plans and workflow process for assigned client specific groups
  - Able to review and interpret stop loss request and projections for client specific groups
  - Review 25% stop loss reports- provide clinical forecasting and prognosis to any questions
  - Open and manage 30-40 group specific members that have case management needs
  - Screen referrals and trigger for case management or disease management if necessary.
  - Provide support and assistance to other management teams as it relates to the client specific needs
  - Review and distribute monthly, quarterly and yearly care management reports
  - Respond to emails, phone calls and reporting that is requested by the client
  - Coordinate services specific to member's needs and requests that are made by the client
  - Will refer to the Medical Director on any case where there is a question of quality of care, questions on the disease process, and/or treatment plan in place
  - Travel if necessary to provide one on one support to clients if needed
  
2. The RN client liaison must communicate, verbally and in writing, clearly and effectively with team members, patients, patients' families, health care providers, physicians and customers, both "internal and external."
  
3. The essential job functions identified below will be evaluated through peer review, discussions with medical director, and random file review by the supervisor to ensure that all QA requirements are met.
  
4. The RN client liaison must promote nursing professionalism:
  - Maintains current clinical knowledge and skills through the attendance of seminars, available Internet education, written works, or other similar resources on a biennial basis as evidenced by a documented 24 CEU hours during a two year renewal period as recognized by the State Board of Nursing.

- Understands responsibility in preserving the patient's confidentiality. This includes signing of an annual confidentiality statement and recognition that patient information is used only for purposes necessary for conducting case management.
- Effective professional communication skills to all parties involved, (i.e.: listening, written, and verbal).
- Must be flexible to changing situations and needs.

5. The RN client liaison organizes work load and contributes time and efforts to the team work load and responsibilities as evidenced:

- Prompt return of phone calls within 24 hours or the next business day.
- Daily review of all new referred cases and actions plans implemented.
- Completing all case work and reporting in a timely manner in compliance with policies and procedures.
- Attendance and/or participation in the majority of team meetings.
- Identifying and/or providing feedback on department workflows to increase efficiency.
- Participation in Policy and Procedures, CEU, and/or QA committees as assigned.

6. The RN client liaison must be able to operate a personal computer, copier, fax machine, and telephone. Must be able to access, research, and extract information from printed resources, computer terminals, medical records, and telephone interviews on a daily basis. This will be evidenced by demonstration of skills during random observations.

**NON-ESSENTIAL JOB FUNCTIONS:**

1. Preparation of forms, faxing, copying.
2. Organization of files and reference materials.
3. Ability to operate typical office equipment and working knowledge of basic office principles.

**PHYSICAL WORKING CONDITIONS:**

*Physical requirements are representative of those that must be met to successfully perform the essential functions of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Sitting	80%	Reaching	Minimal
Standing	10%	Manual Dexterity	Ability to type/keyboard
Walking	10%	Telephone	High Degree
Kneeling	As needed	Computer Screen	High Degree
Bending	As needed	Lifting	25 pounds

**JOB SPECIFICATIONS:**

*To perform this position successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

**Education and Licensure:**

Bachelor's degree or higher in a health-related field and  
Licensure as a health professional  
or  
RN Licensure and two (2) years clinical practice experience  
Certified Case Manager Certification required, may be obtained after hire date.

**Other Experience:**

Must possess organizational skills and the ability to prioritize multiple tasks, attend to detail and follow through to completion.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel as classified. By signing this statement, the employee understands the scope of their licensure and will practice within the scope of that licensure. If the status of the licensure/certification changes, the employee will notify the department supervisor of the change immediately. The employee understands that failure to maintain current licensure and/or to practice within the scope of that licensure, as well as failure to report any changes in license status, will result in disciplinary action, up to and including termination.

Position Summary received by:

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date