

AGENCY NAME & LOGO

Client Roles and Responsibilities in Case Management

1. To supply requested documentation in a timely manner in order to verify your eligibility and begin Medical Case Management Services.
2. To actively participate in the development of the Medical Treatment Plan/Care Plan, and to work towards achieving the goals listed in it.
3. To be honest when answering questions from AGENCY staff. Giving false information regarding identity, HIV status, residency, or income may result in immediate termination of services or may affect the provision of financial assistance you receive. You agree to update AGENCY staff about any changes in a timely manner.
4. To cooperate with AGENCY staff and volunteers when requesting or receiving services, including keeping your appointments.
5. To treat AGENCY staff and volunteers with respect and consideration.
6. To comply with all AGENCY policies, rules, and procedures.
7. To conduct yourself in an appropriate, non-disruptive and non-threatening manner.
8. To not bring alcohol and/or illegal drugs or drug paraphernalia on-site. If you violate this rule, you may be suspended or terminated from this program.
9. To not use discriminatory statements regarding gender, race, color, creed, religious affiliation, ancestry, national origin, physical handicap, medical condition, marital status, age, and sexual orientation because they are not acceptable. Repeated episodes may result in an interruption in services. **Because the relationship between the client and agency staff (and other clients) is based on mutual respect, discriminatory statements and offensive language will not be tolerated.**
10. To respect AGENCY property. Destruction of AGENCY property may result in the suspension or termination of services. Prosecution may be pursued.
11. To treat everyone with respect. Physical violence, threats of physical violence or sexual harassment to anyone on the grounds of the AGENCY may result in the suspension or termination of services. Prosecution may be pursued.

(Over)

Case Manager Roles and Responsibilities in Case Management

1. To treat clients with respect and dignity in a non-judgmental manner.
2. To inform client of services available.
3. To conduct a client assessment.
4. To involve the client in the development of their Care Plan.
5. To inform the client of all policies, rules, and procedures.
6. To create an open environment where the client's opinions are valued.
7. To protect the client's confidentiality.
8. To conduct medical case management in a professional manner.
9. To conduct myself in an appropriate, non-disruptive and non-threatening manner.
10. To not use discriminatory statements regarding gender, race, color, creed, religious affiliation, ancestry, national origin, physical handicap, medical condition, marital status, age, and sexual orientation because they are not acceptable. **Because the relationship between the client and agency staff (and other clients) is based on mutual respect, discriminatory statements and offensive language will not be tolerated.**
11. To treat everyone with respect. Physical violence, threats of physical violence or sexual harassment to anyone on the grounds of the AGENCY may result in the filing of a grievance, disciplinary action, or legal action.

I have read and understand my responsibilities as a client and the Case Manager's responsibilities at AGENCY.

Printed Name: _____

Signature _____ Date _____

Case Manager Name: _____

Case Manager's Signature: _____