

A DAY IN THE LIFE OF A CASE MANAGER

Case managers coordinate services, support individuals and families, maintain compliance, and ensure accurate documentation across complex service environments. Their work keeps care plans moving, services aligned, and organizations operating efficiently. Below is the day in the life of a case manager!

Morning: Planning, Reviewing, and Preparing

Technology helps case managers start the day with clear visibility into priorities, alerts, and client information so they can focus on people instead of searching through systems.

- Review caseload updates, alerts, and service notes
- Confirm daily appointments and scheduled visits
- Review and update care or service plans as needed
- Respond to urgent service changes or client needs
- Prepare documentation and notes for upcoming interactions
- Check compliance or authorization requirements

Midday: Coordinating Services and Supporting Individuals

Case Manager technology enables real-time collaboration and shared access to information so teams can coordinate services faster and more accurately.

- Communicate with providers, families, and internal teams
- Coordinate referrals, authorizations, and service delivery
- Monitor client progress toward goals and outcomes
- Conduct client check-ins, visits, or virtual meetings
- Update service plans based on changing needs
- Collaborate across departments for holistic support

Afternoon: Documentation, Reporting, and Compliance

Simplify documentation and reporting so case managers can complete required work efficiently while maintaining compliance and data accuracy.

- Document services delivered and client interactions
- Complete required case notes and compliance documentation
- Track billing-related service data and approvals
- Generate reports for internal teams or funders
- Review data for accuracy and audit readiness
- Prepare follow-ups and next-day priorities

Talk to our team at Vertex to streamline Case Management work to get hours back in your day!