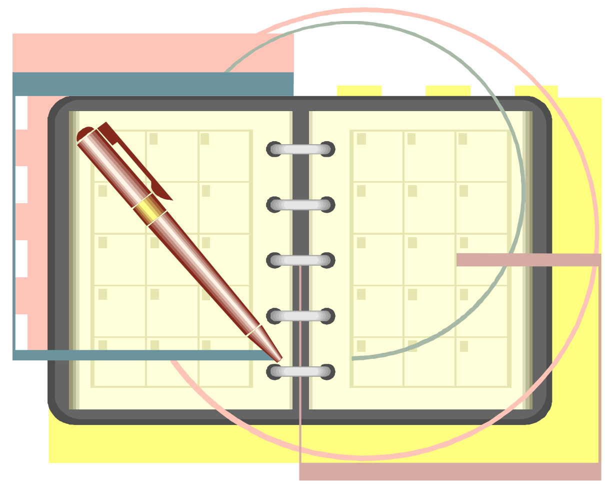
Getting Personal

Why it Matters in Case Management

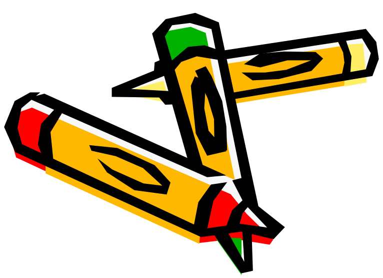
Agenda

- Case management as defined by you!
- Taking time to work smarter not harder…
- Building Rapport
- Resources
- Case notes
- Assessment
- Using LMI



What is a Case Manager's Role?

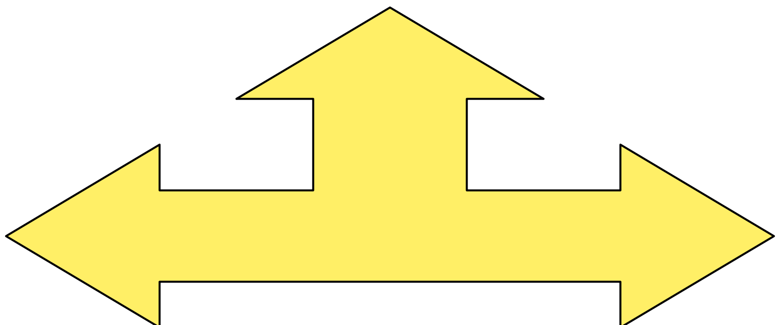
- Coach- looks ahead, helps client clarify their vision and move forward
- Mentor- looks across, shares of him/herself to encourage client
- Counselor- looks back, tries to fix the past so client can move on



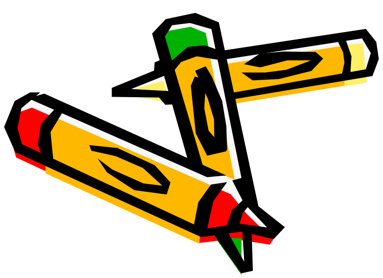
Let's just get into it- Case management barriers

Common Measures

Case load size

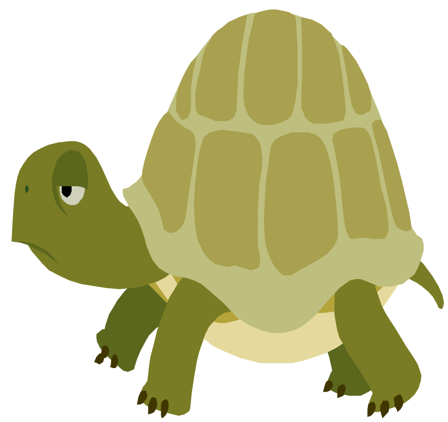


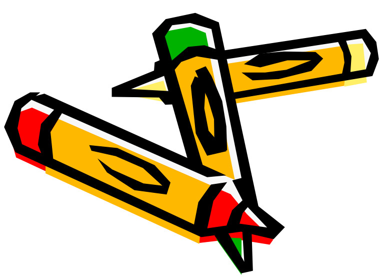
Variety of Customers



Slow Down…

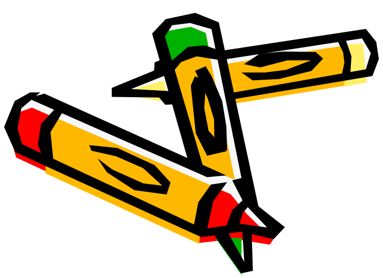
- Organize your space & case load
- Time Management
- Prioritize your workload
- Build a rapport with clients
- Document everything!

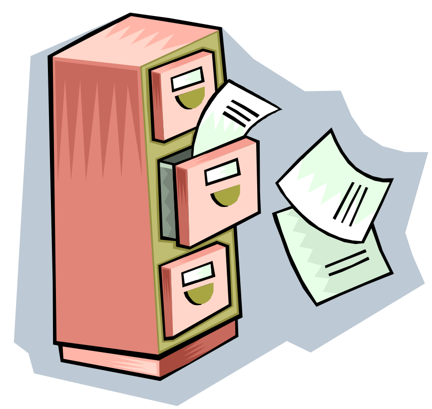




Organizing Your Space

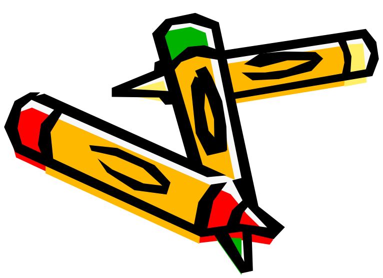
- Everything has a place…
- Keep up with filing
- Label drawers/file cabinets/files
- Keep plenty of desk supplies
- Create a "Zen" in your space





Time Management

- Outlook, calendar, PDA
- In time, On time, Every time…
- Schedule client appointments with breaks to case note/review notes
- Hold group meetings when possible
- Create "cheat sheets"



Prioritize Your Workload

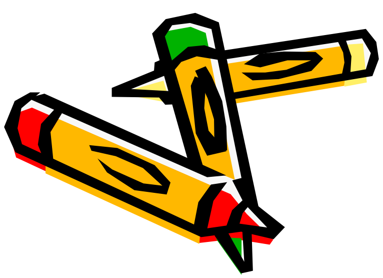
- High Risk Clients – contact most
- Medium Risk Clients – contact more
- Low Risk Clients – contact less

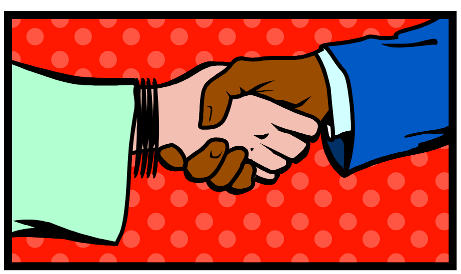
Building Rapport

- Establish respect
- Inform the client- keep them in the loop
- Be flexible, fair, and consistent
- Under promise; over deliver
- Encourage open and honest communication

Building Rapport - 2

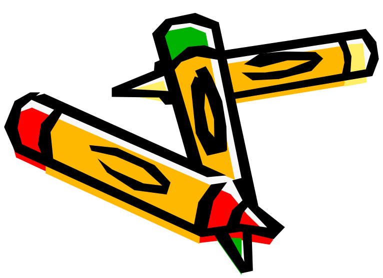
- Use interpersonal skills- listening
- Maintain frequent contact – email, phone, in person visits
- Know your customers
- Empower your customers!





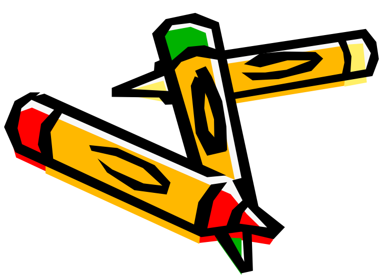
Documentation
AKA
Case Notes

- No documentation = nothing happened
- Case notes are vital to your job
- Set goals <u>with</u> your customer
- Track customer progress/goal attainment
- Document *your work* with the client



Case notes should be:

- Clear- easy to understand for the reader
- Chronological – wait…what happened?
- Relevant- so what?
- Illustrative – should tell the customer's "story"



Example: Case note guideline

Purpose

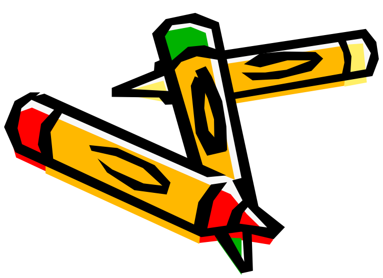
The purpose of this is to establish guidance on the use of case notes that record participant interactions. Case notes are important for several reasons:

First, case notes allow staff / service providers to keep an accurate record of all participant interactions and activities.

Second, for monitoring and auditing purposes, case notes document the reasons and rationale for decisions concerning participant activities.

Third, fiscal staff can utilize case notes to support payments associated with training and supportive service activities.

And **fourth**, case notes demonstrate that participants are receiving on-going support from service providers and that they are not in a state of "permanent hold."



This guidance applies to *all* participants.

Example: Case note guideline

Standard Practices

- As a general practice, case notes should be written to document any *significant* participant interaction. Significant participant interactions would include all of the following:
- Contacts with a participant that produce new information affecting the delivery of services or planned outcomes from services.
- Interactions that are associated with the decision to provide specific services to a participant. (Such as training)
- Follow up contacts with a participant to assess their status in training or their status in the employment follow up process.
- Any other participant interaction that is assessed to be significant by the staff person. Such participant interactions can include in-person visits, phone contacts, email exchanges, or the exchange of information through the mail.
- As a matter of documenting activities with participants, case notes that detail services and/or document specific participant interactions must be made at least once every calendar month.
  - All such case notes should be entered into the MIS System on a real time basis to document significant participant interactions or services.
  - All case notes should be written in full and complete sentences and with the best possible grammar.

Case Notes – Continued

GED Preparation

This case note is to be used each time that a participant is provided with GED basic education activities. Each time that a participant is provided with GED related services, the following specific information should be included in the case note:

In one or two sentences, describe the participant's need for adult education services;

In one or two sentences, describe the specific adult education activities that the participant will receive;

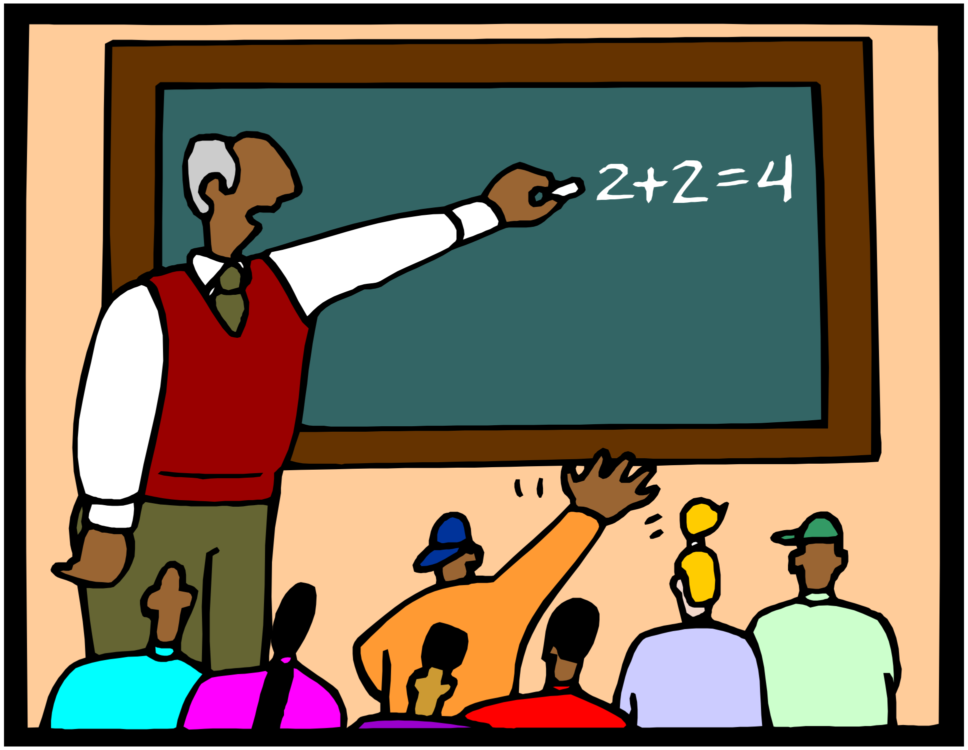
In one or two sentences, describe the specific adult education program the participant will be attending, the time and place of the education activity, and the planned duration of the activity; and,

In one or two sentences, describe the planned outcome(s) from these adult education activities, including the specific skills the participant is to acquire.

Resources

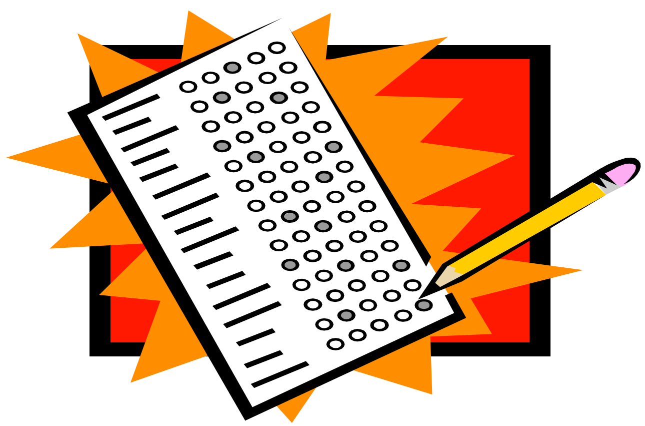
- Rolodex – have the BEST in town!
- Resource book
- Asset Mapping
- Referrals
- Partnerships/Connections

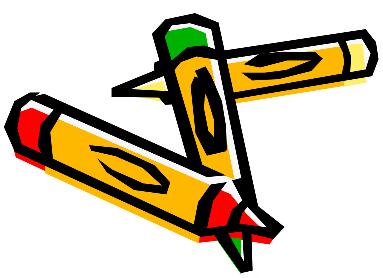
Extras....



Assessments

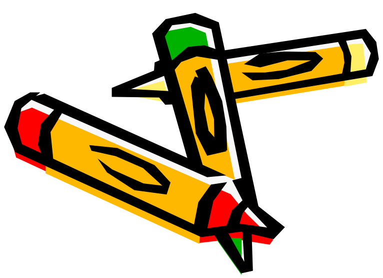
- Why do you use assessments?
- How does it inform the path for your customer?
- Career Inventory, TABE, Work Keys





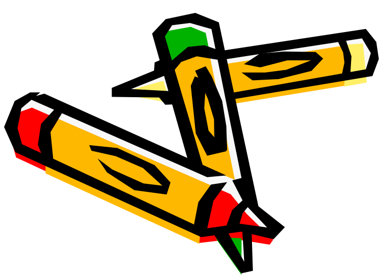
Labor Market Information (LMI)

- What is LMI?
- How do you use it in case management?
- Transferable skills
- High demand occupations
- I need education for that?



How does this fit together?

- Being organized, managing your time, prioritizing your work, being resourceful, knowing your job, using LMI to make informed career decisions **<u>with</u>** your customer, utilizing assessments to inform IEP/ISS....
- Makes you a great case manager = customer retention = better performance!



Questions??