

CASE MANAGEMENT: In Search of the Optimal Workflow

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Inc.**

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Session Outline

Introductions

Session Purpose

Case Management


Ethics

Cultural Competency



Introductions: Who is Rufus Johnson?

- Born in Macon, attended public schools and college in Georgia
- From substitute teacher to Interim Deputy Superintendent of the Department of Juvenile Justice Schools
- Teacher, Principal, Adjunct Professor
- Partner with B-ROW / A Better Way Today, Inc.
- Part time Federal programs coordinator with the Georgia Department of Juvenile justice, Education Division
- Serves on several Community Boards



Introductions: Who are You!

Your name and
why you are here

Where you work
and job
responsibilities?

Tell the group
something you do
that is fun for you
and gives you joy!

Session Purpose

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- Add detail here
- Add detail here



Case Management Principles

- **Build Trusting Relationships**
 - Convey Empathy
 - Focus on the Client
- **Use Evidence-based Practice**
 - Analyze and Adjust
 - Collect and Analyze Quality Data
- **Empower your Client**
 - Dignity, worth, and rights
 - Help Client define and own their story
 - Recognize the client's individuality


Case Management Types

Clinic-based

Community-based

Intensive

Case Management Goals

- Individual and family independence to access services and support
 - Case Manager to work him/herself out of a job
 - Case Manager seeks less formal support to replace mental health system, e.g. family, social services, etc.
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- A large yellow triangle is positioned in the bottom right corner of the slide, pointing towards the top right.

Case Manager Job Description

Help clients with chronic illness

Mental health issues

or Life-altering conditions
gain access to rehabilitation
programs and other
community services

Case Manager Job Description

Duties: meet with clients and their families

Connect clients with professional services

Maintain consistent communication to assess client wellbeing

Make changes to their treatment plan, as needed

Case Manager Duties and Responsibilities

- Working with, assessing, listening to, recording , evaluating, following up, initiating, completing, gathering, accompanying, coordinating, accomplishing, determining, establishing, monitoring, maintaining, communicating, preparing, improving, meeting, updating, enhancing, possessing, providing, developing, conducting, accompanying, maintaining, alerting, obtaining, participating in, assisting, working in, performing, arranging, motivating, critical thinking to, problem solving to, flexibility to...
- **Towards the end of the day**, they add their notes to an ongoing report that documents their client's progress. They also make phone calls and schedule appointments on their client's behalf.

So, What is Case Management?

I know what I cannot do, but what can I do?

Case Managers are not ...

Mother or
Father

Big brother or
big sister

Taxi or
chauffeur

“Gofer” or
“Do for
person”

Friend or
companion

Date, escort

Accountant,
bookkeeper or
loan agent

Police Officer

Case Managers Should Not

- Sit in on the psychiatrist's appointment
- Leave messages, write no-show letters
- **What else?**

Case Managers

Complete the following statements:

provide services whereby a social worker / counselor / case manager must ...

social workers / counselors / case managers must have....



**What support
experiences
do you have**

Support to

- children
- children who have been raped,
or otherwise sexually abused
- adults only
- both children and adults
- senior citizens only

**What Case
Management
experience do
you have**

**Who provides case
management support**

**What is your role in
the process**

Case Management Elements

Assessment

Specific Plan of Care
development

Referral/linkage and related
activities

Monitor and follow-up activities



Elements of Case Management

- **FIRST:** A comprehensive **assessment** to determine the need for medical, educational, social or other services
 - Determine individual's strengths and preferences
 - Take client history
 - Identify needs and complete related documentation
 - Gather information from other sources
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Case Management Assessment Activity

- In the past 30 days has your situation in case management been difficult for you? Provide an example of a specific case
- If yes, how difficult
- If yes, describe the current situation and what type help you think you need
- Who else provided support
- Were they helpful and are you still working with them

Elements of Case Management

SECOND: Develop a specific plan of care

- List the recovery goals and actions
- Include the client as an active participant
- Address the same goals and objectives as the treatment plan

Plan of Care: What Needs to Be Considered

- Build trust with the client
- Determine support groups needed
- Assess the effectiveness of the plan

Elements of Case Management

THIRD: Referral/Linkage and related activities to help individuals obtain needed services.

- Plan for linkage and referral activities
- Do the actual referral and linkage

Linkage... TWO PARTS

Strategy: Create
timelines,
appointments,
priorities, etc.

Implement the
plan: Assist with
accessing services
and supports

Elements of Case Management

FOURTH: Monitor and follow-up activities

- Ensure care plan is effectively implemented and adequately addresses the client's needs
- Decide with whom to follow-up
- Monitor to determine improvement

Monitor Implementation

You are not monitoring the client. You are monitoring the implementation and effectiveness of the plan.

- Is this active treatment?
- Is it appropriate treatment?
- Does the client agree the overall plan is effective
 - Is the client getting the services in the plan?
 - If not, why not?
 - If yes, are they satisfied with the provider's services?
 - Are providers doing as expected?
 - Are they coordinating their respective roles?

Share your story: Success and Challenges

Risk of Plan Non-Compliance

- Loss of funding
- Reduction in reimbursement rates
- Significant paybacks
- Exclusion from future opportunities
- Personal risk to professional license

Let's Practice Case Management Process

Case Management Process Group Activity: 15 to 20 minutes

- Participants break into seven (7) groups, 3 to 4 participants each
- Each group discuss assigned step of the process
- Answer the following questions:
 - What documentation happens during this stage?
 - To whom do you need to talk?
 - What's required has to happen to allow you to move from this stage to the next stage?

Activity Debrief

- What type documentation did you discuss
- To whom did you decide to discuss your thoughts
- What is needed to move to the next stage?

Individual Activity: Case Management Assessment in Action

- What information should you gather on the client?
- How do we use the information to help the client?
- Develop rapport and explain the process
- Develop a permission question
- Develop open-ended questions

Possible Questions or Statements

- Tell me about your employment.
- Tell me about your work history and educational background.
- Who lives in the home; who is working; who is in school; who is a citizen? How would these individuals support you or be a barrier to your participation in activities?
- How old are the individuals in your home, and what is your relationship with them?
- Who is not in the home, but who is involved with the family, and what resources do they offer?

Development of Plan

- Mutually develop the plan with the client
- Determine long-term and short-term goals
- Identify activities to address the short-term goals
- Prioritize the accomplishment of activities, if needed.
- Establish time frames for beginning and completing the activity
- Outline how the plan will be coordinated with partner agencies.
- Be clear about the case manager's role in the plan.
- Establish dates for reviewing progress and the method of contact between the case manager and client
- Update plan as needed

Family Issues

- Domestic violence issues
- Alcohol and drug issues
- Housing issues
- Health issues
- Pregnant women/women with infants
- Youth/child issues
- Children living with adults who are not receiving cash benefits
- Noncustodial Parent