What Is Case Management Anyway?

Basic Housing Case Management Training

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Overview of Case Management

• Roles of Case Management
• Definition of Case Management
  o Basically, case management services provide a single point of accountability for coordination of services
  o In supportive housing, case management services are designed to offer the tenant support in living independently and establishing and maintaining residential stability.
Intake

• Screening
• Establish eligibility (i.e. household need for housing placement, etc.)
• Paperwork (i.e. ROI, Consents)
• Clearly explain CM role, program, etc.
• Determine what you need to know to help the tenant stay housed
• Identify what you need to know to protect the stability of your other tenants
Assessment

“Assessment is a procedure used to determine the client’s problem or situation for purposes of selecting interventions or treatment modalities. It is a process that involved getting to know the whole person – his or her motivations, strengths, weaknesses, and capacity.”

Betsey S. Vourlekis and Roberta R. Greene
Assessment

- Engagement and rapport
- Client-Centered Approach
- Develop objectives, strategies, and goals
Areas of Assessment

• Housing
• ADL (i.e. budgeting, hygiene, cooking, etc)
• Social and Environmental Support/Resources (formal/informal)
• Health
• Adherence to medical treatment plans
• Risk factors & Risk reduction needs
Areas of Assessment (cont’)

• Legal Assistance
• Partner Notification
• Physical, Cognitive, Emotional, and Behavioral Functioning
• Nutritional Counseling
• Health Literacy
• Education (adult learning classes)
• Financial and Benefits
• Insurance
Identify Stress Points

- Economic/financial issues
- Health-related concerns
- Loss of community/family
- Parenting pressures
- Psychological stressors
- History of violence
- Spiritual voids
- Lack of food or other basic needs
- Physical mobility
Developing Service Plans

- Ongoing process
- Client-centered approach
- CM use of engagement techniques
- Identify needs to create goals, objectives
  - Methods and Services
- Strengths and Assets
- Identify desire and motivation to change
  - Use of readiness ruler
Components to Service Plan

• Identified Needs
• Goal Statements
• Objectives (reasonably achievable)
  – What client will do to meet goals
• Linkages/Referrals Interventions (staff)
  – Action steps, treatment strategies, tasks, etc
Writing Tips for Service Plans

• Non-judgmental, respectful language
  – Evidenced by, appears vs. seems
• Use complete sentence structure
• Clear description
• S.M.A.R.T.
  – Specific, Measurable, Attainable, Realistic, Time-limited
Re-assessment Considerations

- Evaluate client’s progress
- Describe outcomes and achievements
- Conduct needs assessment
- Prioritize needs/problems
- Develop objectives/goals
- Write S.M.A.R.T.
- Assess readiness
- Ongoing positive guidance/reinforcement
Discharge

• When is it appropriate to discharge a client
• How to discharge a client
• What if it’s difficult for client to terminate
• Referrals (i.e. transfer, outreach)
• Documentation
• Notice to providers of case closure
• Follow your agency protocol
Motivational Interviewing

“A client-centered, yet directive method for enhancing intrinsic motivation for positive behavior change by exploring and resolving ambivalence.”

Guiding MI Principles

1. Resist the righting reflex
2. Understand your client’s motivations
3. Listen to your client
4. Empower your client
5. Develop discrepancy
What are OARS?

- Open-ended questions
- Affirmations
- Reflective listening
- Summarizing
MI Strategies to Evoke Change Talk

- Ask evocative questions
- Explore decisional balance
- Ask for elaboration
- Ask for examples
- Look back
- Look forward
- Query extremes
- Use change rulers
- Explore goals and values
- Come alongside
‘Change Talk’

• Recognize client language that favors movement toward change

• DARN-C
  – Desire: “Why would you want to make this change?”
  – Ability: “How would you do it if you decided?”
  – Reasons: “What are the three best reasons?”
  – Need: “How important is it? 0-10; and why?”
  – Commitment: “What do you think you’ll do?”
Mental Health First Aid Action Plan

- **Action A**: Assess for risk of suicide or harm
- **Action L**: Listen nonjudgmentally
- **Action G**: Give reassurance and information
- **Action E**: Encourage appropriate professional help
- **Action E**: Encourage self-help and other support strategies