

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
 - Basically, case management services provide a single point of accountability for coordination of services
 - 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.”

Miller, W.R. & Rollnick, S. (2002)

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 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