

# A GUIDE FOR CASE MANAGERS

## CURRICULUM BLUEPRINT

Torrey Harrison, LCSW and David Whitestone Ph.D.

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**The intent of this guide is to present a broad overview of case management tasks and strategies to help you do your job. This guide is not intended to be an exhaustive discussion of the legal and regulatory expectations, nor is it a comprehensive resource guide. We hope this guide will provide you with ways to think about and meet the tasks of case management that are grounded in family-centered, client driven principles. Chapter One – Introduction to Case Management**

**Introduction to Case Management** presents an overview of the Department of Health and Human Services – Children’s Behavioral Health Services *Children’s Targeted Case Management Practice Guidelines*. This module covers the Case Manager’s roles, values, and legal and regulatory responsibilities. It also contains information about resources, the service systems, strategies for developing a professional identity and establishing a working alliance with the child and family.

### **Competencies**

- A The participant will demonstrate understanding of the Case Manager roles and legal and regulatory responsibilities.
- B The participant will demonstrate understanding of the values inherent in the delivery of case management services.
- C The participant will demonstrate understanding of the resource and service system (DHHS – MH and MR) and funding streams.
- D The participant will demonstrate understanding of developing a professional identity and establishing an alliance with the child and family.

### **Chapter Two – What Every Case Manager Needs from Supervision**

This module provides an overview of the role of the supervisor and what the case manager can expect for clinical and administrative supervision.

### **Competencies**

- A The participant will demonstrate an understanding of the minimum licensing standards governing supervision and the difference between administrative and clinical supervision.
- B The participant will demonstrate an understanding of the supervisor’s role to teach and guide the case manager in skill development, clinical and resource knowledge, best practice and professional ethics.
- C The participant will demonstrate an understanding of the supervisor’s role in monitoring, evaluating and providing constructive feedback of the case manager’s performance in the coordination and delivery of services.
- D The participant will demonstrate understanding of the supervisor’s role in managing difficult situations and conflicts, negotiating the service system and other stressors related to delivering case management services.
- E The participant will demonstrate an understanding of the nature of the professional relationship between supervisor and supervisee.

### **Chapter Three – Communication**

Effective communication is the cornerstone of good practice. This module presents an overview of basic human relations skills and strategies for clearly and accurately communicating ideas verbally and in writing. It also contains strategies for promoting effective teamwork and conflict resolution.

### **Competencies**

- A The participant will demonstrate knowledge of basic human relations skills.
- B The participant will demonstrate the ability to listen empathically and sensitively.
- C The participant will demonstrate the ability to accurately communicate verbally and in writing.

- D The participant will demonstrate the ability to promote effective group (team) communication.
- E The participant will demonstrate the ability to manage and resolve conflicts.

#### **Chapter Four – How to Conduct an Assessment**

Conducting an assessment is an essential responsibility of a case manager. This module presents an overview of basic assessment/interviewing skills as well as strategies for building rapport, discovering strengths and natural supports, defining needs and understanding the family, cultural and environmental influences on the child and the family. This module will introduce the case manager to assessment tools s/he is required to use.

#### **Competencies**

- A The participant will demonstrate an understanding that assessment is a continuous and ongoing process.
- B The participant will demonstrate the ability to facilitate communication by building rapport through listening skills, by being aware of their own presentation, and the expression of respect, genuineness and empathy.
- C The participant will demonstrate the ability to gather information from various perspectives of family members and providers, based on both verbal and nonverbal communication, as well as through observations made during the interview(s).
- D The participant will demonstrate knowledge of the life domains covered in the assessment, as well as the assessment tools required by DHHS (CALOCUS, CAFAS, FES).

#### **Chapter Five – Establishing the Discharge Criteria**

The Discharge Criteria sets the end goals for the case management service. This module presents an overview of the process, rationale and benefits of discharging a client from Case Management services. This module contains strategies for writing the discharge criteria based upon the assessment information. It also provides strategies for empowering and supporting the child and family to advocate for themselves.

#### **Competencies**

- A The participant will demonstrate understanding that discharge is an ongoing process, which begins with the initiation of services and is continuously addressed throughout the delivery of the case management service.
- B The participant will demonstrate the ability to establish the discharge criteria that is based on the assessment and child and family's goals.
- C The participant will demonstrate the ability to help the child and family develop, practice and master the skills that are needed to effectively utilize their strengths and resources in order to manage new challenges upon discharge from case management services.

## **Chapter Six – Keeping the Plan Moving or Coordination Made Easy**

This module explores the practical application of strategies for time management, organization for meeting and managing a caseload. It also presents strategies for maintaining effective collaboration between team members, and identifying and resolving barriers to collaboration.

### **Competencies**

- A The participant will demonstrate understanding of the tasks involved in effectively managing a caseload and utilizing administrative support.
- B The participant will demonstrate the ability to plan, organize and convene a team meeting.
- C The participant will demonstrate the ability to help maintain an effective collaborative among team members.
- D The participant will demonstrate understanding of potential barriers to the collaborative process.

## **Chapter Seven – Facilitation Skills**

Facilitation is a skill and an art. This module presents an overview of strategies for designing and conducting team meetings, establishing and supporting teamwork, utilizing the assessment information in the planning process and group problem-solving.

### **Competencies**

- A The participant will demonstrate the ability to coordinate and facilitate a team meeting.
- B The participant will demonstrate the ability to establish and support teamwork.
- C The participant will demonstrate the ability to use assessment information in the planning process.
- D The participant will demonstrate the ability to problem-solve with a group.

## **Chapter Eight – Writing the Individual Support Plan**

The module presents a step-by-step process for writing a Discharge Criteria, Crisis Plan, Individual Support Plan (ISP) and incorporating monitoring of specialized individual treatment plans (ITPs) into the ISP.

### **Competencies**

- A The participant will demonstrate the ability to help the child and family set priorities, define goals and identify resources and natural supports.
- B The participant will demonstrate the ability to write a Discharge Criteria based on an initial assessment.
- C The participant will demonstrate the ability to write a comprehensive Crisis Plan.
- D The participant will demonstrate the ability to write an ISP that includes a child and family's strengths, needs, natural supports and resources.
- E The participant will demonstrate the ability to include a specialized ITP in the ISP.
- F The participant will demonstrate the ability to assist the child, family, and other natural and service supports to maintain a strength-based, family-centered perspective in the development of action steps for attaining the goals.

## **Chapter Nine – Plans are Living Documents**

The ISP is a living document, it should always be an accurate reflection of what work is being done with the child and family. This module presents a step-by-step process for ongoing monitoring, evaluating and modifying of the Individual Support Plan (ISP).

## **Competencies**

- A The participant will demonstrate the understanding that the ISP is continually reviewed and adjusted until the goals have been achieved.
- B The participant will demonstrate the ability to accurately record progress toward the goals and utilize the ISP action steps to maintain a collaborative and cohesive team and track completion of identified tasks and responsibilities.
- C The participant will demonstrate the ability to evaluate whether selected strategies are facilitating reaching the identified goal(s).
- D The participant will demonstrate the ability to utilize the Wraparound fidelity standards to improve the capacity of the team to keep the ISP functional, family-centered, strength-based and outcome-oriented.

## **Chapter Ten - Trauma**

Trauma is a universal experience that affects all of us. This module presents a framework for thinking about and responding to individual responses to trauma. It contains an overview of effects of trauma and strategies for working with trauma related issues and building resiliency.

### **Competencies**

- A The participant will demonstrate an understanding of the different kinds of trauma, such as abuse and neglect, medical trauma, witnessing domestic violence, etc., and their effects on children and families.
- B The participant will demonstrate an understanding of the importance of promoting and maintaining safety for individuals.
- C The participant will demonstrate an understanding of and strategies for promoting resiliency.

## **Chapter Eleven - Advocacy**

Advocacy is a function of case management. The case manager needs to have an understanding of how and when to advocate for the child and family. This module contains an overview of advocacy and functioning as a liaison.

### **Competencies**

- A The participant will demonstrate understanding of the role of an Advocate and when to rely on an advocate to support a child and family.
- B The participant will demonstrate understanding of the importance of functioning as a liaison.
- C The participant will demonstrate strategies for empowering the child and family to advocate for themselves.