

CASE MANAGEMENT



What is Case Management

- **Case management** is the coordination of services on behalf of an individual person who may be considered a case in different settings such as health care, nursing, rehabilitation, social work, disability insurance, employment, and law.

What we will cover

- What Role Assessments Play in IEP Creation
- Some Reasons Why the IEP should be Completed
- Short / Long Term Goals
- The S.M.A.R.T Approach
- Veteran Buy-In
- Follow-Up Based Off IEP

Assessments – Starting Point

● Initial Assessment

An evaluation of a jobseeker's employment history, education, skills, and interests that results in the identification of employment goals, barriers to employment, and services needed to obtain goals.

● Objective Assessments

An objective assessment is more intensive than an initial assessment and is utilized to collect specific information regarding a customer's service needs, goals, interests, academic levels, abilities, aptitudes, supportive service needs, and measures barriers and strengths

Assessments – Starting Point

Find Seeker **Seeker Info** Des Job Title Edu/Cert Work History Referrals Core Enroll Other Scratch Pad Svc Referral Adv. Query

Name and Address Information
XAVIER EXAMPLE JR.
Mailing Address: #1 SAMPLE DR
Street Address:
Phone Numbers
Home: Cell: ST LOUIS MC 63125
Work: Other: Bad Address Homeless Email: example@example.com

Personal Information
Date of Birth: 05/10/1970 Age: 45 Searchable
Gender: M Share resume

Veteran Information
Vet Status: V - Regular Transition:
 Recently Separated
 Served in Campaign
 Print on Summary (Resume)
 Service Ended by Disability
Served From: 08/06/1987 Served To: 05/01/2014
Branch:

Seeker Status
Emp Exchange: Active 05/28/15 Last Update: 05/28/15 Workkeys ID:
Case Management: Active Next Appt: Time:
UI Ben Year Beg Dt: Inactive Next Task:
Dislocated Date: EB
Actual Enrollments Possible Enrollments

Job Contacts:
App ID: 12915275
DCN:
Trainee ID#:

Services Provided

Date	Type of Service	Employment Counselor
05/28/15	Career Guidance	GARY JENSEN
05/28/15	Referred to Other Services	GARY JENSEN
05/21/15	Referred to Other Services	GARY JENSEN
05/21/15	Staff Assisted LMI	GARY JENSEN

Source: ELISSA THARP Partial Seeker
 Restricted SSN Discrepancy Deceased Web Info Save Cancel

Hi, my name is Al.

- What branch of the service were you in?
- Thank you for your service!
- How can I assist you today??



Assessments – Starting Point

The screenshot shows a software interface with several tabs: Employment, Education, Support System, Financial Needs, and Basic Skills Tests. The 'Employment' tab is highlighted with a red box. Below the tabs, there is a table for 'Employment History' with columns for Employer, City, and St. The first entry is 'THE SAMPLE CO', 'ST LOUIS', and 'MO'. Below the table, there are fields for Job Title (CLERK), Start Date (11/01/00), End Date (09/01/06), Months (71), Per (Hourly), Salary (10.00), and Hrs. Wk. There is also a 'Job Description' field with the text: 'Performed general clerical duties including data entry, bookkeeping, customer service.' Below this is a 'Current Employment' section with fields for 'Currently Working', 'Looking for work', 'Type of work', 'Longest Worked Employer', 'Why Left', 'Applied and Not Hired', 'Can't Look/Accept Job', and 'Quit or Fired Reason'. To the right of the 'Employment History' section are 'Job Seeking Skills' and 'Job Keeping Skills' sections, each with several text input fields and dropdown menus. At the bottom right, there are 'Save' and 'Cancel' buttons.



Getting to know the veteran

- Does vet actually have an SBE?
- What is preventing this veteran from being successful?

Getting to know the Veteran



- **I was a cook**
- **Prepared meals and stuff like that**
- **Wow I never looked at it like that. I did do all those things**
- **Oh and I did go Advanced Culinary school**

Army Veteran – 92G Food Service Specialists
SBE(s) – 40% (SC) disabled, low income
Barrier: Lacks Transportation, no resume, lacks interviewing skills or how to sell himself, and really doesn't know what he brings to the table

ONET Online Military Crosswalk

1. Trained workers in food preparation, and in service, sanitation, and safety procedures
2. Operated, maintained and cleaned field kitchen equipment
3. Prepared menus, planned, prepared, and served meals
4. Preparation and cooking of various foods and bakery products
5. Checked delivery for quantity and assisted medical personnel in inspection for quality
6. Estimated ingredients and supplies required to prepare recipes

IEP – Starting Point

File Edit Navigation Options Utility MO Utility Window Help

Employment Plan - XAVIER EXAMPLE JR. (###-##-0894) | GARY JENSEN (573)522

Enrollment Appropriateness Employment Plan Progress Closures

Show Closed Services Show Closed Tasks EO Notice: Plan: 2 of 2

◆ Start Date: 04/11/16 Closed:

◆ ONet:

◆ Goal:

◆ Justification:

LMI

Objective: Start Date: 04/11/16

Service: Hours:

JO #: Hourly Wage:

+ Add Task
- Del Task

End Date: Outcome:

- Del Service

Comments:

Schedule Print Plan + New Plan - Del Plan Save Cancel

- What barrier(s) are you assisting the Vet overcome??
- Would this person benefit from Enhanced Services?



Think of the IEP as a....

Plan to Success



Principles of Motivation

- ⦿ Incentive and Motivation
 - What's in it for me?
- ⦿ Expectation and Motivation
 - Do I believe I can Succeed?
- ⦿ Attribution and Motivation
 - To whom or what do I attribute responsibility for my successes or for my failures?

Reasons we Create an IEP

- Provides a plan for the veteran, as well as, the DVOP
- Helps set expectations
- Builds self-esteem
- Provides a guide for effectively assisting the veteran
- Increases the number of placements and success stories
- Helps facilitate meaningful follow-up

IEP

- Conduct Individual Employment Plan (IEP)
 - The purpose of the goal-setting conversation is to decide what the veterans key accomplishments should be in the coming days, weeks, months, etc
 - Short term and long term goals

The screenshot shows a software interface for creating an Individual Employment Plan (IEP). The form is light blue and contains several sections:

- Goal:** A text area with labels for "Short Term Goal:" and "Long Term Goal:".
- Justification:** A text area containing the text "Justification of why truck driving is good. Must be accompanied by LMI." Below this is a small button labeled "LMI".
- Objective:** A text input field.
- Start Date:** A date input field with the value "03/28/16".
- Service:** A text input field.
- Hours:** A text input field.
- JO #:** A text input field.
- Hourly Wage:** A text input field.
- End Date:** A text input field.
- Outcome:** A text input field.
- Comments:** A text area with the text "Detailed plan on what you will do to get seeker from A to B. Can continue in case notes by placing a note here explaining that plan is in the case note area."
- Training Program:** A text input field.

On the right side of the form, there are three buttons: a green "+" button labeled "Add Task", a red "-" button labeled "Del Task", and a red "-" button labeled "Del Service".

Short Term Goal

- Is a specific objective the veteran must **complete** before he or she is able to achieve the long-term goal(s). Goals which can be pursued immediately, and which you can finish in less than 6 months.

Short Term Goals should concentrate on the following area(s)

- **Removing or Reducing Barriers / Obstacles**
 - ✓ Remove obstacles getting in the way of obtaining the long-term goal
- **Experience**
 - ✓ Gain as much experience in your intended field as possible.
- **Education**
 - ✓ Furthering your education
- **Professional Reputation**
 - ✓ Creating a strong, positive professional reputation, so that potential employers will want to give you the opportunity
- **Networking/Contacts**
 - ✓ Career success doesn't only hinge on what you know -- who you know also matters a great deal.

Short Term Goals

Example: To get an entry-level kitchen job in a nearby restaurant

TASK	FINISH BY
Attend interviewing skills workshop here at CareerSource. It is conducted every Tues @ 10AM	July 1
Attend the Resume Writing Workshop here at CareerSource. Conducted every Thursday @ 9AM	July 12
Create your resume detailing your kitchen experience and skills	July 15
Apply for entry level kitchen work at 3-5 nearby restaurants	July 25
Contact restaurant manager 1 week after applying to follow up and check their hiring plans	August 1
If I do not have a job offer by August 15, I will expand my job searching along my bus route	August 10

Long Term Goals

- Something the veteran wants to do or accomplish in the future. Long-term career goals can take years to achieve and are the road to the future
- Require time and planning. These goals allow you to know what short-term goals to set and keep the veteran focused on making the present count for the sake of the future

Examples:

- To obtain employment as a or in the field of
- To Earn a Degree or Certification
- Achieving a specific title

Other things to consider when establishing a long term goals.

- What resources would help the veteran reach their goals?
- Are there any organizations that will assist the veteran?
- Being flexible is important. Change your focus on goals as your life changes

IEP Tips

- A well-written goal **must be measurable**. The goal must be stated in such a way that it can be assessed whether or not the goal was accomplished.
- **For example**, a goal stating that *veteran will understand a concept* would be impossible to measure. Only by demonstrating through a concrete action (initiate a greeting, for example) can the veteran perform a goal that can be measured.
- Focus on taking them through the steps that will lead them to where they can see that long range goal.
- DON'T write goals **too far off** into the future which appear unattainable.
- Use **SMART** goals

Use SMART Goals

- **S** is for **Specific**
 - ✓ **Specific** goals that are very clear about what they are expected to achieve
- **M** is for **Measurable**
 - ✓ The veteran cannot know if they have achieved a goal or completed a step unless it is some how measurable.
- **A** is for **Attainable**
 - ✓ The goal and specific steps should be realistically attainable within the time frame
- **R** is for **Relevant**
 - ✓ Steps to be undertaken must be relevant to the stated goal.
- **T** is for **Trackable**
 - ✓ Use specific dates in order to measure success or the IEP is meaningless

Get the veterans' “*buy-in*” to their IEP

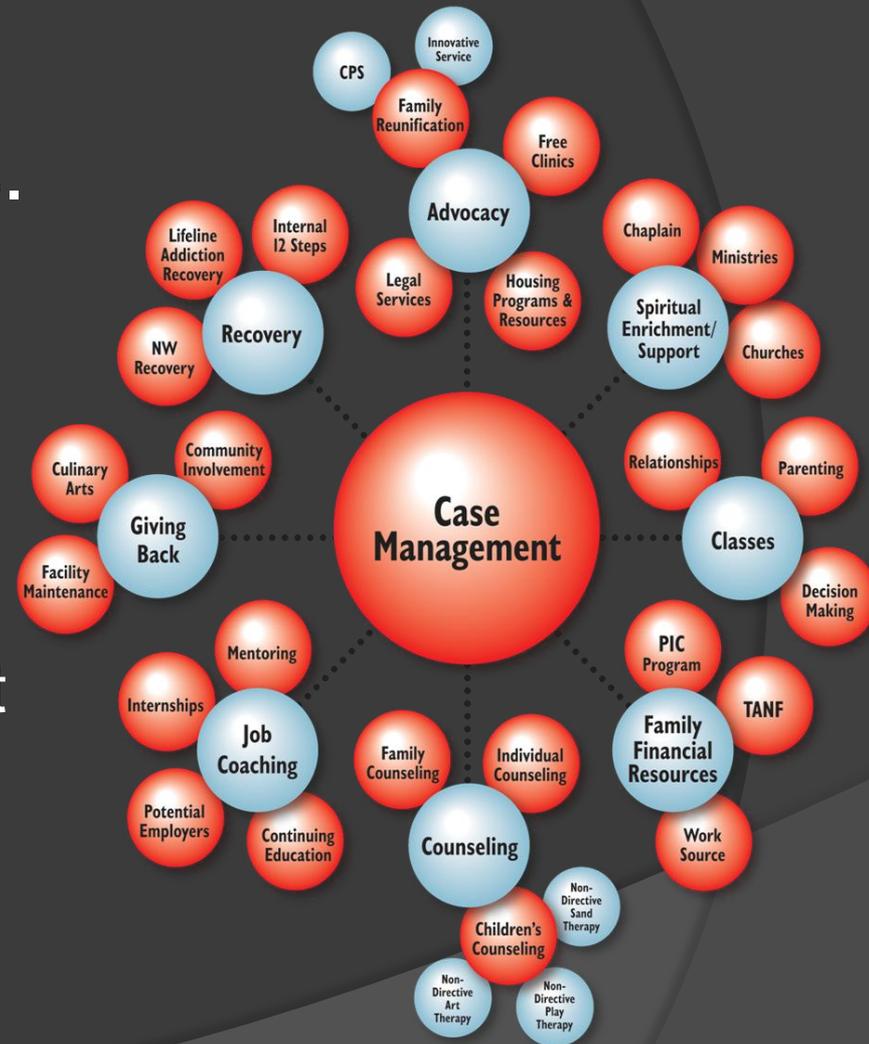
- The IEP is a *negotiated agreement* between the veteran and the DVOP detailing what the veteran will do for their development, and what the DVOP will do to assist them in that effort.
- It is therefore imperative that the IEP be written with the full participation of the veteran. It is essential for the veteran to be part of developing their IEP in order to achieve “*buy in*” and give it their full effort.



Follow-Ups

Two types of follow-ups.

- Primary Counselor follow-up.
- Local Case management follow-up.



Primary Counselor Follow-up

- ◎ Client services were not extensive
 - Resume will be passed to LVER very quickly.
 - Follow-up can be by phone or in person.
 - Follow-up will be performed on a regular basis.
 - Will check in with the client bi-weekly at a minimum.
 - Follow-up will always be recorded in case management system (toolbox).
 - Scheduler (Task)
 - Case Notes

Case Management Follow-up

- ◎ Client services were extensive
 - Client will require services to prepare for movement of resume to the LVER.
 - Follow-up will be in person (three documented attempts)
 - Follow-up will be preformed weekly.
 - Follow-up will be documented.
 - Next appointment on the scheduler.
 - Case note to include what is next.
 - Any changes to the IEP.

IEP Follow-up

- There can be no follow-up without a good, specific IEP
- The DVOP must know exactly what is being followed up on.
 - ✓ “Hey just checking in on you. How’s it going?” – FAIL
 - ✓ Haven’t heard from you things going okay?” - FAIL
- The veteran must know exactly what it is they are expected to do.
- You can’t follow-up on vague, not agreed upon goals / steps.

Follow-up

- Follow-up is ongoing & positive - Don't wait for failure
- Keep track of all important dates in the IEP, and check prior to deadlines to make sure the veteran is doing what they should be doing, and committed to doing
- An effective IEP process requires extensive follow-up to make sure things are happening as planned
- An effective IEP is not about playing “*gotch ya*” after the veteran failed to do something
- It is important to remember that the IEP is about being successful in the program

Confronting Tough Issues

- Try to hear the feelings beneath a persons words
- Be in touch with your feelings
- Be ready to forgive and ask for forgiveness
- Be responsible to change your own attitudes and behaviors
- Stay with one issue at a time

Confronting Tough Issues (Con't)

- Call time out when a discussion becomes destructive
- Stay in the here and now
- Never use the word never
- Avoid rude remarks
- Avoid blaming

In Conclusion

- What Role Assessments Play in IEP Creation
- Some Reasons Why the IEP should be Completed
- Short / Long Term Goals
- The S.M.A.R.T Approach
- Veteran Buy-In
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Questions ?

