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.
Case Management Process

CASE MANAGEMENT PROCESS
High Level

Screening → Assessing → Planning → Implementing (care coordination) → Following-Up (ongoing) → Transitioning (transitional care) → Evaluating

Stratifying Risk → Communicating Post Transition

The depth of this phase varies based on the case management practice setting. For example, Stratifying Risk is a major phase in settings such as health insurance, chronic care management, and population management. In other settings such as acute and long-term care, Stratifying Risk may be combined with Assessing phase.

Level varies by practice setting. Includes gathering data needed for Evaluating Outcomes phase.
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.
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

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

- 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
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

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