

CARLA STOREY, LCSW-S

VP OF PROGRAMS

SAMARITAN HOUSE

CORE FUNCTIONS & STAGES OF CASE MANAGEMENT



GOALS FOR TODAY

Understand the basic functions of case management

Understand the pieces of case management

What are you hoping to get out of today's training?

RAPPORT BUILDING

What do we mean by this?

Why is it important?

Ways to build rapport with clients

- Get to know them outside of the client file
- Respond!
- Follow-through
- Set clear boundaries
- How do you build rapport with clients?

ASSESSMENT

How this differs
from a screening

Elements of a
good assessment

What information
should be
gathered at
assessment

Purpose of
assessment

Incorporating it
into the service
plan

GOAL SETTING

Elements of a strong goal (SMART)

Make it collaborative

Use assessment as guide

Make it trauma informed

Client takes the lead



DOCUMENTATION

Purpose of documentation

Document progress or lack of progress on goals

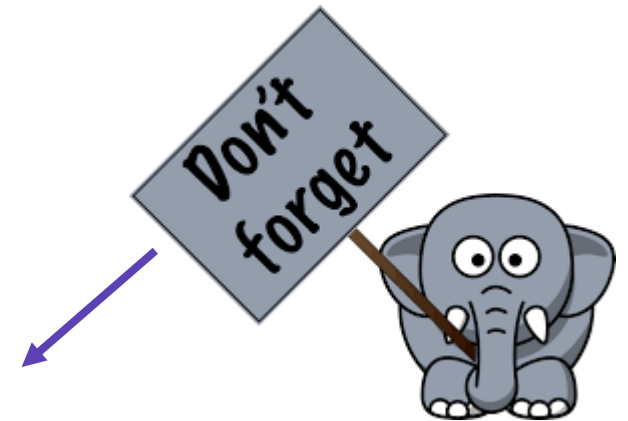
Timeframe to complete them

Level of detail to add

Keep in mind who will read your documentation

Documentation tips

If you didn't document it, it didn't happen!



SUBJECTIVE VS OBJECTIVE

Objective Language

- Observable - can see, hear, touch
- Reports facts
- Able to be counted
- Would be the same from multiple reporters

Subjective Language

- Opinions
- Judgments
- Assumptions
- Beliefs
- Varies from person to person
- Perception

SERVICE
COORDINATION

Driven by complex needs of
client population

Services your agency
provides vs what client needs

Learning about various
services in our community

Relationships matter!

COLLABORATION



Crucial in
our field!



Warm hand-
off



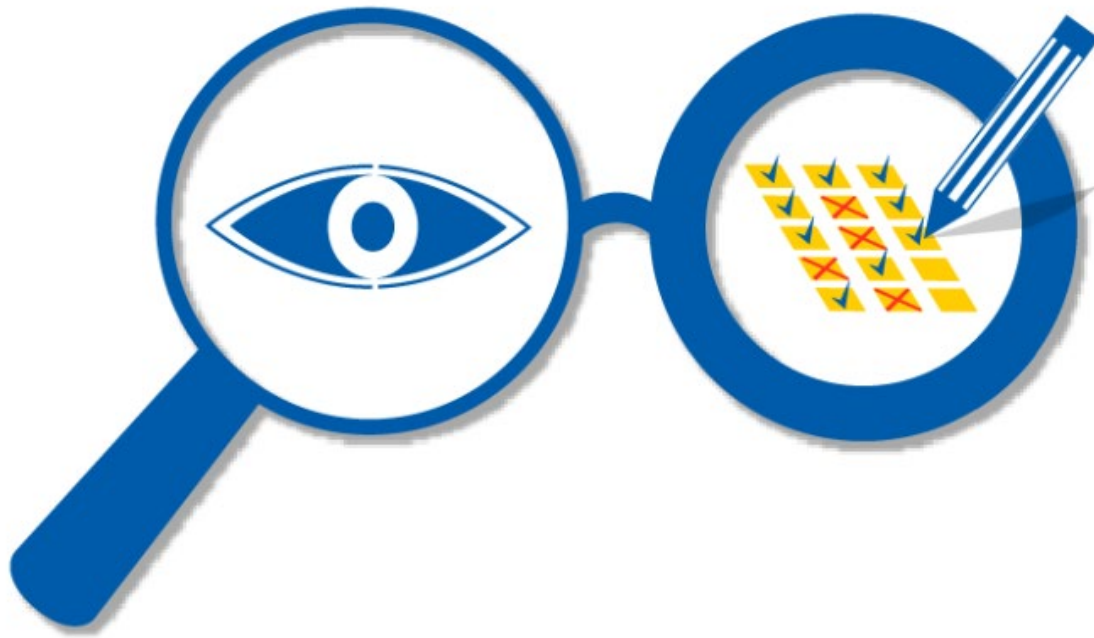
Passive
referral



Facilitated
referral



Active
referral



- Purpose of doing this
- How to monitor and evaluate goals and service plan
- How often it should done
- What you do with the results

MONITORING & EVALUATION

TERMINATION

- Know your agency's policy for this!
- HUD sets guidelines for HUD funded programs
- Discharge planning begins at intake!
- Planned vs involuntary discharges
- Example of termination process



AFTER CARE & FOLLOW-UP

What is an after care plan?

Elements of an after care plan & when to do

Purpose of these 2 things

Recommended time frames

What to do with this information?

Challenges of conducting follow-ups



Thank You!

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QUESTIONS?