Case Management Series: Service plans, Documentation, and Exit Planning

Amanda Rosado
Technical Advisor
Florida Housing Coalition
rosado@flhousing.org

THE FLORIDA HOUSING COALITION

Sponsored by the Department of Economic Opportunity

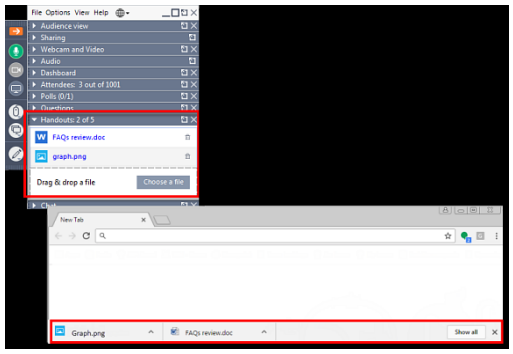
The Florida Housing Coalition, Inc., is a nonprofit, statewide membership organization whose mission is to **bring together housing advocates and resources so that all Floridians have a quality affordable home** and suitable living environment.

WE'RE PROUD TO OFFER PROFESSIONAL
CONSULTING SERVICES

In the areas of affordable housing, fair housing, ending homelessness, & related issues

Webinar Logistics

- Participants are muted
- Enter your questions in the box in your webinar panel
- Handouts are available with this webinar
- Forgot to ask a question or want to ask privately? Email me at rosado@flhousing.org
- This webinar is being recorded and will be available at www.flhousing.org
- A survey will immediately follow the webinar; ***please*** complete it! Thanks!



Trauma Informed

Housing Focused

Recovery Oriented

Person Centered

Must Haves

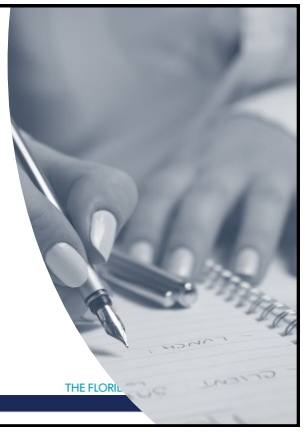
Documentation

What system do you use?

A. HMIS
B. HMIS & Another System
C. Case Management Software
D. Electronic Health Records
E. Other

Documentation Should Be…

✓Strengths-Based
✓Person First
✓Specific
✓Objective
✓Non-Clinical



Strengths-Based Language

FOCUSED ON BARRIERS
- Non-compliant
- Lacks insight
- Stubborn
- Manipulative
- Attention-seeking

FOCUSED ON STRENGTHS
- Not open to…unwilling to
- Does Not Agree
- Really trying to get help

*PCRP Language Handout
*Ally's Guide

Person First Language

INCORRECT	PERSON FIRST
• Schizophrenic	• Person with schizophrenia
• Addict	• Person with addiction
• Mentally Ill	• Person with a mental health diagnosis
• Disabled	• Person with a disability
• Homeless	• Person experiencing homelessness

THE FLORIDA HOUSING COALITION

Specific and Objective

- Specific: Be clear so an outsider could read the note and understand
  - CM will follow up on birth certificate
  - CM will contact the clerk at DOH to check on the status of the birth certificate applied for on 3/22
- Objective: Impartial and Unbiased
  - Avoid "I think"
  - State matter of fact what the client said or did

Non-Clinical

- Do not use clinical terms if you are not a clinician
- Use plain language
  - Decompensating v. Experiencing symptoms of illness/addiction
  - No need to go into affect/mood unless it is necessary

Client Visit Record			
Client Name:	*Mary Lamb*	Date:	12/02/2017
Type of Contact:	*Home Visit*	Time:	3:30pm
Kept/Missed/RS	*Kept*	Length of Visit:	30
Subject: *Housing Stabilization*			
Note: *CM met with CL for a scheduled home visit.* *Previous Actions:* *-CL followed up with New Horizons and enrolled in the employment program. CL's first day will be on 01/08. New Horizons will provide transportation.* *Actions:* *-CL requested a referral for the UCC food pantry. CM will fax a referral to UCC tomorrow.* *-CM scheduled an office visit for 12/18/2017 at 9:00am. CM provided 2 bus tickets for an upcoming medical appointment.* *Amanda Rosado, CM*			
Goals Addressed: *Employment; Housing Stability; Transportation*			
Signature:		Date:	

Service Planning

Consumers lead, control, exercise choice over, and determine their own path of recovery by optimizing autonomy, independence, and control of resources to achieve a self-determined life. By definition, the recovery process must be self-directed by the individual, who defines his or her own life goals and designs a unique path towards those goals.

(SAMHSA, 2011)

THE FLORIDA HOUSING COALITION

Assessments and Planning

- Assessments should lead us right into the planning process.
- Assessments help us answer the questions:
  - Why are they here? (Housing)
  - What do they want?
  - What are the solutions?

THE FLORI

Types of Planning

01

Crisis Planning

- To be used when the client is in crisis at time of assessment

02

Action Planning

- After assessment, the action plan is comprised of client/program goals

03

Exit Planning

- Starts at the beginning of the CM process; Details the process of exiting CL from the program

THE FLORIDA HOUSING COALITION

Crisis Planning – In Crisis

- Get the person safe
  - Where can they stay?
- Do they need medical attention?
  - What hospital do they prefer?
- Do they need mental health crisis services?
  - Know your mental health crisis providers
  - Assess for suicide risk

Crisis Planning - Proactive

- How will you know you're in crisis?
- Who should be contacted?
- What information is okay to share with your support system?
- How have you coped with crisis before?
- What does not work?

*Crisis Plan Example

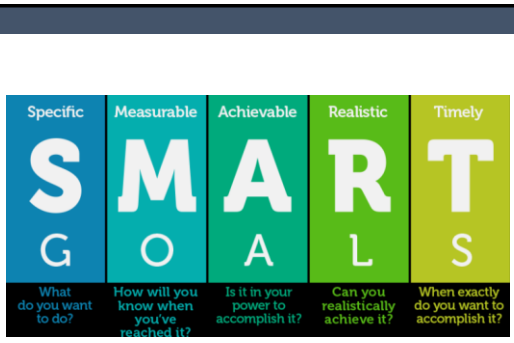
Exit Planning – Outcomes?

Shelter	RRH	PSH	MH Program
-Housing is obtained	-Housing is stable -CL feels they can sustain rent on their own -Services are no longer needed -HH paying no more than 50% of income toward rent	-Housing is stable -Intensive support services are no longer needed -Another subsidy becomes available	-Step down into lower MH case management -Maintaining treatment on their own; CM is not needed

Action Planning

- Goal setting with outcomes in mind
- Solicit client goals; what resources do they have?
- Reviewed Regularly
- Not a formality; tailor made

Microsoft Word Document



We are not good predictors of success

Time Management

New Case Timeline

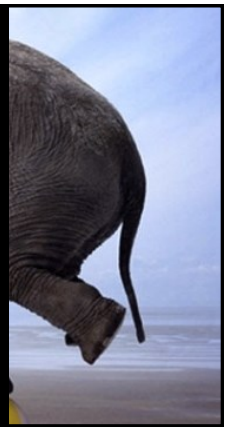
- Coordinated Entry referral immediately
- File Created – Within 3 business days of assessment
  - See Handout "Intake Progress Note"
- Action Plan – Within 1-2 weeks of assessment
- Ongoing Case Notes – Written and Filed within 3 business days

Other Timelines

- Staffing – Weekly
  - See Handout "Staffing Form"
- Audits – Supervisor 4 files/month
- Personal Supervision – Monthly
- Group Supervision - Monthly

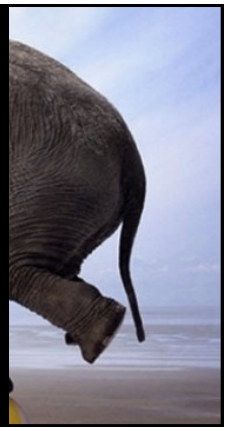
Pro Tips

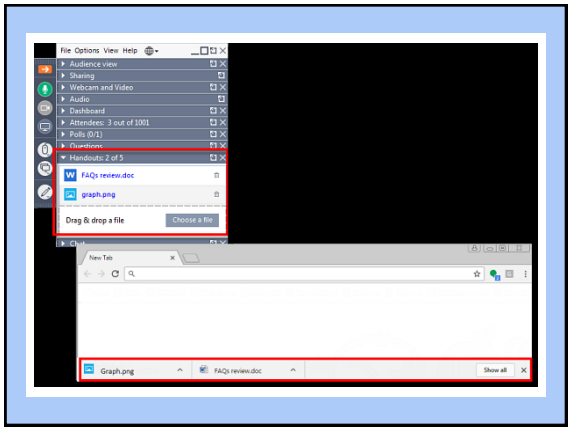
- ✓Document Concurrently
- ✓Schedule Appointments early in the day
- ✓Plan the day before (print out what you need)
- ✓Schedule "To Dos" in your calendar
- ✓Objective-Based Visits
- ✓Right-sized Case Loads



Pro Tips

- ✓Block out time on your calendar
- ✓Take breaks when you need them (lunch break)
- ✓REST when you are sick
- ✓Take a mental health day
- ✓Commit 1 hour per week to personal and professional development





Resources

- www.orgcode.com – OrgCode Consulting
  - Creator of the VI-SPDAT, SPDAT
  - Housing Based Case Management Forms (Crisis Plan, Exit Plan, etc.)
- www.endhomelessness.org – National Alliance to End Homelessness
  - Rapid ReHousing Toolkit
  - Emergency Shelter Webinar Series
  - Lots of resources for system performance, coordinated entry, etc.
- https://www.hudexchange.info/homelessness-assistance/
  - CoC/ESG rules
  - Coordinated Entry resources
  - Grantee information for your CoC and community
- www.usich.gov – United States Interagency Council on Homelessness
  - Tools (H1 Assessment Tool, Federal Resource guides and Fact Sheets)

Case Management Series

- 2/15/2018 - A Collaborative Approach to Ending Homelessness: Finding Your Role
- 3/1/2018 - Introduction to Working with Special Populations
- 3/15/2018 - A Trauma-Informed Approach
- 4/5/2018 - How to Work with Difficult Cases
- 4/26/2018 - Self-Care for Human Service Workers