National Veterans'
Technical Assistance Center

Homeless Veterans' Reintegration Program (HVRP) Post-Award Conference: Case Management

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Case Management

Case Management Definition

Case management is a collaborative process of assessment, planning, facilitation, care coordination, evaluation, and advocacy for options and services to meet an individual's and family's comprehensive needs through communication and available resources to promote quality, cost-effective outcomes.

➢ Intake/Enrollment

➢ Needs Assessment

➢ Individual Employment Plan (IEP)

➢ Monitoring and Evaluation

HVRP Case Management Activities

Required HVRP Case Management Activities

➢ Outreach and Engagement

➢ Assessment and Intake

➢ Developing an Individualized Employment Plan (IEP)

➢ Job Search

➢ Job Placement and Retention

Purpose of Case Management Files

➢ Provides the case manager and the client with a means of developing a plan and tracking progress

➢ Documents evidence of services provided and actions taken to assist clients

➢ Creates a level of accountability for the expenditure of time and resources on a client's behalf

➢ Case files should be created with a complete stranger in mind

Assessments

➢ Case management begins with an in-depth assessment

　➢ Assessment is an ongoing process during which the case manager observes the client, records pertinent information, and identifies other sources of information

　　➢ Not every veteran you assess will be an immediate fit for your program; you should maintain their initial assessment/case file, so if they return for services at a later date, you can simply update the file and proceed with case management

➢ The case manager works closely with other staff to identify necessary referrals for shelter, clothing, food, and other immediate crisis intervention needs

Determining Eligibility (1 of 2)

➢ The most important document for the case file and enrollment into a grant program for veterans is the Form DD-214 or other verification of veteran status as allowed by your agency

➢ The veteran must provide the DD-214 that includes the character of discharge (any one of copies 2–8)

➢ Depending on your specific grant, the time spent in active duty will also need to be verified (Guardsmen and Reservists)

➢ HINQ (recently changed to VBMS)/SQUARES

Determining Eligibility (2 of 2)

➢ If the veteran does not have a copy of their DD-214, assist them in obtaining one. Contact your federal point of contact (POC) if you need assistance

➢ Do not delay assessment and crisis intervention services awaiting a DD-214. However, based on the requirements of your grant, you may not be allowed to enroll the client without documentation of eligibility, especially when financial assistance is required

Documenting HVRP Case Management Activities

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➢ File Maintenance and Process

  ➢ If you did not document it, it did not happen

  ➢ Try to do case notes right after your meeting

  ➢ Avoid making assumptions about how the person is feeling in your notes

  ➢ Follow the standardized agency process for file maintenance

  ➢ Be detailed and specific

Case File Contents (1 of 2)

At a minimum, the following items are expected to be available in the case management file at the time of the on-site visit:

➢ Form DD-214 or other official proof of veteran status

➢ Intake form

➢ Assessment

➢ Verification of homelessness/at-risk status

➢ Education history

➢ Employment history

➢ Marketable skills

Case File Contents (2 of 2)

➤ Licenses and credentials

➤ Job referrals (date and name of employer)

➤ Supportive services

➤ Documentation of services provided

➤ Individual Development Plan (IDP)/IEP

➤ Don't forget to maintain Personally Identifiable Information (PII)

Documented Services (1 of 5)

➢ What services were provided, by whom, and when. Examples of services:

 ➢ Physical and psychological health referrals

 ➢ Testing

 ➢ Resume assistance

 ➢ Training (list the name of training and agency; include costs and appropriate documentation associated with training)

 ➢ Work clothing (list exactly what was purchased with grant money and the cost; include receipt(s))

Documented Services (2 of 5)

- ➢ Any tools for their employment (again, list exactly what was purchased with grant money and the cost; include receipt(s))

- ➢ Other supportive services provided (driver's license, birth certificate, bus passes/gas cards, etc.; include receipt(s))

- ➢ Shelter provided and by what organization; other housing assistance as it pertains to your specific grant

- ➢ Job clubs (list the dates of attendance)

- ➢ Employment workshops (list dates)

Documented Services (3 of 5)

➢ Referrals to other agencies for services:

  ➢ U.S. Department of Veterans Affairs (VA)

  ➢ Department of Housing and Urban Development (HUD)

  ➢ State Vocational Rehabilitation (not the VA)

  ➢ VET Center

  ➢ American Job Center (SNAP E&T, JVSG, WIOA, Federal Bonding, WOTC, etc.)

  ➢ Online referrals to supportive services

➢ This list is not exclusive; annotate any and all services provided to the client

Documented Services (4 of 5)

➢ Referrals to other agencies and homeless programs

  ➢ Record dates, times, and names of the agencies to which you have referred the veteran

  ➢ When possible, call the service provider in advance to discuss the purpose of the referral

  ➢ Conduct follow-up with the veteran and/or agency and record the results of each referral in case notes; update IEP as necessary

  ➢ It is the grantee's responsibility to de-conflict enrollees with other nearby organizations operating the same type of grant – no duplicate participants are permitted!

Documented Services (5 of 5)

➢ Each training course that the veteran attends should be documented in the case file and include, at a minimum:

  ➢ Date conducted

  ➢ Name of training course (copy of curriculum, if applicable)

  ➢ Organization and name person conducting the training

  ➢ Copy of certificate of completion in the case file

  ➢ Cost of the training if a vendor was used; include invoice(s)

Case Management Implementation Strategies

Motivational Interviewing (MI)

➢ MI is a collaborative conversation that focuses on increasing the participant's motivation to change

➢ The case manager uses active listening and other techniques to guide the conversation, but the client drives the process

Engage in Work Talk

➢ Work talk means engaging in purposeful conversation with veterans about work

➢ It challenges veterans and staff to change their perspective and think differently about their experiences

➢ Work talk may include discussing previous successes and failures or encouraging participants to explore new possibilities

Tips for Co-Enrollment

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➢ Ensure all decisions are veteran-centered

➢ Make sure you and the veteran sign a release of information (ROI)

➢ If possible, have all parties working with the veteran attend case planning and review meetings

➢ Schedule consistent check-in meetings to ensure everyone is on the same page

➢ As the veteran's goals shift, make sure everyone is informed

Case Management Skills for HVRP

Case Management Skills for HVRP

➢ Unconditional positive regard

➢ Empathy

➢ Proactive listening

➢ Guide and move to action

Questions?

Thank you!

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