



National Veterans'
Technical Assistance Center

Homeless Veterans' Reintegration Program (HVRP) Post-Award Conference (PAC): Roles and Responsibilities for Case Managers

August 7, 2025

Reminder



HVRP best practices will be shared during this session. NVTAC encourages all grant recipients to utilize best practices that may improve their service delivery. Before implementing a practice discussed during this session, please review your award statement of work and contact your Grant Officer's Technical Representative (GOTR) to discuss if it is an allowable cost or activity or if it requires an amendment to your approved plan.

Case Management Roles and Responsibilities Overview

Roles and Responsibilities Overview – A Reminder VETS' Policy Guidance Requires Case Management



- Case Management is a required service for grant recipients to provide in accordance with VPL [06-24](#), Section VIII C.
- Three Main Components:
 - Needs Assessment
 - Individual Employment Plan (IEP)
 - Employment and Supportive Services

With effective case management, you have a greater likelihood of achieving the goals of the participant and of the program.

Roles and Responsibilities Overview

- HVRP case managers are *essential* in keeping participants engaged and progressing in the program
- To support veteran participants in reaching their full employment potential and obtaining high-quality career outcomes, HVRP case managers:
 - Lead the collaborative process of assessment, planning, facilitation, care coordination, evaluation, and advocacy for options and services to meet participants needs
 - Align with a variety of partners to ensure supportive services are available to the participant to address all employment barriers with a goal of coordinated service delivery
 - Provide follow-up services and support to participants in support long-term stability and employment retention

Pre-Case Management: Intake and Enrollment

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- These first steps after initial outreach set the stage for effective case management
- Building rapport and trust with the veteran starts at first contact
- Includes verifying the individual meets all program requirements
- Collect necessary documents for eligibility (i.e., Form DD-214, identification, income information, housing documentation, etc.)
- The intake process is where you will obtain the necessary information on veterans seeking services

Determining Eligibility

- 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 provides the character of discharge (any one of copies 2–8).
 - Depending on your specific grant, the time spent on active duty will also need to be verified (Guardsmen and Reservists).
 - Hospital Inquiry (HINQ) (recently changed to Veterans Benefits Management System [VBMS])/Status Query and Response Exchange System (SQUARES).
- 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.

Case Management: Needs Assessment, IEP, and Supportive Services

Case Management Files

- As a reminder, case managers are responsible for maintaining accurate and comprehensive case 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

Definition of Case Management

- Per [VPL 06-24](#), case management is a collaborative process of assessment, planning, facilitation, care coordination, evaluation, and advocacy for options and services to meet an individual's comprehensive needs through communication and available resources to promote quality, cost-effective outcomes.
 - Needs Assessment
 - IEP
 - Employment and Supportive Services

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.

Developing an Individual Employment Plan (IEP)

- All agency partners should work together with the client to develop an IEP that may include the following components:
 - Barriers
 - Short- and long-term goals/objectives
 - Tasks to be completed by the client
 - Timeframes for each event
 - Dates when reviews of the plan will take place
 - Lists of other partners/organizations who will be involved
 - Projected employment date
- Can't obtain the end goal without all or most barriers resolved

Updating IEPs

- The IEP is maintained and updated in the client's case management file
- The IEP should be considered a living document and updated regularly:
 - When the client overcomes a barrier/meets a goal, or when another barrier/goal has been identified
 - When additional needs of the client are identified that require a plan of action
 - When working on goal planning

IEP Quick Tips

- Based on veteran choice
- Identifies job strengths and barriers to achieving goal
- Identifies all resources/supports/stakeholders that can aid in the process
- Lists both long- and short-term goals leading to employment outcome: Specific, Measurable, Achievable, Relevant, Time-bound

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

Employment and Supportive Services



- Once a participant is determined *eligible* and *enrolled* into HVRP, grant recipients provide needed career exploration and placement services, job-driven training, and supportive services so the veteran may secure employment in stable, high-demand occupations earning livable wages, utilizing the following methods:
 - Job Search Assistance
 - Supportive Services

Job Search Assistance

- How will the veteran identify and apply for relevant positions?
- Veteran buy-in is key
 - Although HVRP case managers cannot conduct a job search without the veteran's investment, they should use strategies that cultivate their engagement and enthusiasm
- Job search assistance includes focusing on building practical skills, identifying and initiating employer contact, and conducting successful interviews with employers
- Approaches to utilize may include, but are not limited to:
 - Job club participation
 - Identifying personal strengths and goals
 - Resumé and application preparation
 - Interviewing techniques
 - Receiving labor market information

Supportive Services

- Services provided to assist enrolled HVRP participants with overcoming all barriers to employment and support the reintegration back into the labor force
- HVRP cannot meet *every* need a veteran may have
 - Grant recipients must conduct outreach and coordinate with other local and national organizations and supportive service programs to assist HVRP participants in overcoming barriers to employment
- For information on the difference between supportive services and training for HVRP, please view the [NVTAC Microlearning Video: Difference Between Participant Training and Supportive Services.](#)

Tips for Co-Enrollment

- Co-enrollment means enrollment in more than one applicable program with partnering agencies
- 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

Post-Case Management: Follow-Up

Follow-Up (1 of 2)

- Employment follow-up is very important, and the following information must be available in the case management file:
 - Pay stubs from the veteran, OR
 - A record of the date, phone number, and name of the person at the place of employment verifying that the veteran is still employed (try to obtain current wages earned).
- Maintain regular contact with the veteran during their employment to head off any potential problems that could interfere with employment retention. Document those conversations in case notes.

Follow-Up (2 of 2)

- Depending on your organization's guidance, if the veteran becomes unemployed, you may re-open the case file and begin immediate assistance to obtain new employment.
- Make note of the last day the veteran was employed.
- If the veteran remains employed, continue to obtain pay stubs or contact the employer for the required time frame as specified by your grant.
- Be sure you make appropriate notations in the case management file as to how you validated the employment; include names and telephone numbers.

Motivational Interviewing Process

Motivational Interviewing

- Motivational Interviewing (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 process is driven by the client.
- Focus on where the person is at in terms of the five stages of change: pre-contemplation, contemplation, preparation, action, and maintenance.
- MI recognizes that change is hard, and the process is fluid.

Source: Miller W., Rollnick S., editors. (2002). Motivational interviewing: preparing people for change. 2nd ed. New York: Guilford Press.

MI Skills

- MI interventions use skills that are applicable to all case management HVRP interventions:
 - Unconditional positive regard
 - Empathy
 - Proactive listening
 - Guide and move to action

Self-Care for Service Providers

Self-Care for Service Providers

- As service providers working with vulnerable populations, maintaining personal well-being is critical.
- Self-care isn't just a personal responsibility; it's essential for maintaining effectiveness when serving veterans with complex mental health and trauma histories.
- Physical exercise, setting professional boundaries, and processing difficult experiences with colleagues can help avoid burnout.
- HVRP programs can benefit from creating an organizational culture that prioritizes staff well-being through open discussions and access to mental health resources.

Case Management Summary

- The case management file should tell a story
 - It must be updated each time you speak with the client, as well as each time a service is provided, or follow-up is conducted
- Assess, enroll, and develop a plan
- Appropriate documentation
- Record all dates, events, and services provided
- Keep in constant contact with the veteran
- Ensure training is fully documented
- Record expenditures with copy(ies) of receipt(s)
- Record follow-up
- Remember, if it's not in the case file, it didn't happen – **document, document!**

Tools for HVRP Case Managers

PY25 HVRP Participant Tracking Sheet

- The Program Year (PY) 2025 HVRP Participant Tracking Sheet can be found on the [HVRP Recipient Resources page](#)

PY25 HVRP Participant Tracking Sheet

Participant Information

Grant Recipient Custom Identifier (Optional)
Organizational or local system identifier

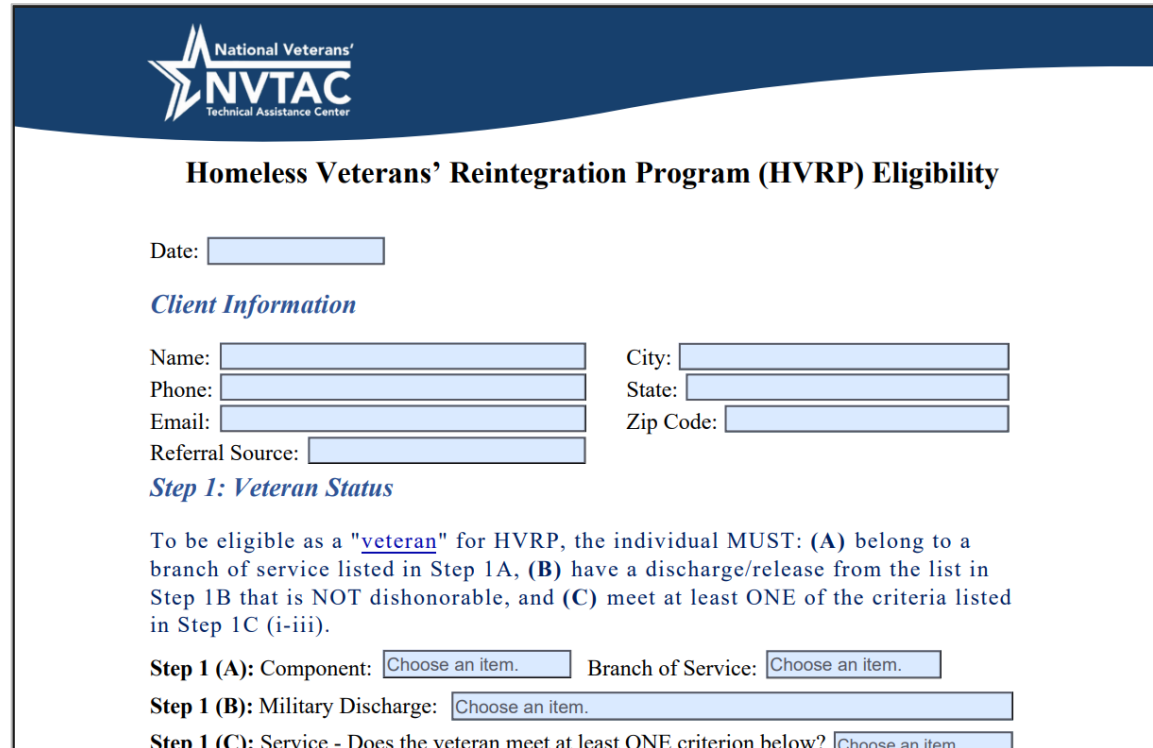
Participant Name
First Name Middle Initial Last Name
Birth Date

Highest Education Level (At First Service)

<input type="checkbox"/> Attained secondary school diploma	<input type="checkbox"/> Attained an Associate's degree
<input type="checkbox"/> Attained a secondary school equivalency	<input type="checkbox"/> Attained a Bachelor's degree
<input type="checkbox"/> Completed one or more years of postsecondary education	<input type="checkbox"/> Attained a degree beyond a Bachelor's degree
<input type="checkbox"/> Attained a postsecondary technical or	<input type="checkbox"/> No educational level completed

NVTAC HVRP Eligibility Tool

- The [NVTAC HVRP Eligibility Tool](#) and accompanying [microlearning video](#) are available on the NVTAC.org website



The screenshot shows the NVTAC HVRP Eligibility Tool form. At the top is the NVTAC logo. Below it is the title "Homeless Veterans' Reintegration Program (HVRP) Eligibility". The form includes a "Date:" field. Under the heading "Client Information", there are fields for "Name:", "City:", "Phone:", "State:", "Email:", and "Zip Code:". Below this is a "Referral Source:" field. The next section is "Step 1: Veteran Status", which contains a paragraph explaining eligibility criteria. Below the paragraph are three fields: "Step 1 (A): Component:", "Branch of Service:", and "Step 1 (B): Military Discharge:". The final field is "Step 1 (C): Service - Does the veteran meet at least ONE criterion below?".

Homeless Veterans' Reintegration Program (HVRP) Eligibility

Date:

Client Information

Name: City:
Phone: State:
Email: Zip Code:
Referral Source:

Step 1: Veteran Status

To be eligible as a "[veteran](#)" for HVRP, the individual **MUST**: (A) belong to a branch of service listed in Step 1A, (B) have a discharge/release from the list in Step 1B that is NOT dishonorable, and (C) meet at least ONE of the criteria listed in Step 1C (i-iii).

Step 1 (A): Component: Branch of Service:
Step 1 (B): Military Discharge:
Step 1 (C): Service - Does the veteran meet at least ONE criterion below?

NVTAC Customizable Forms

- The [Customizable Forms](#) page on the NVTAC.org website hosts a variety of documents that HVRP grant recipients can use as needed, but they are not required.

HVRP Customizable Forms



This section includes a variety of forms that could be used to document HVRP practices. The presentation of these forms does not mean NVTAC or DOL/VETS endorses any particular form as required or as an approved form. These forms were collected from service providers and are only intended to help program planners develop forms and tools that will serve the needs of their program.

The forms in this section are samples for your perusal and information. If program planners would like to use or modify any of these forms for their use, we encourage you to do so.

NVTAC Microlearning Videos

- [Requesting a DD-214](#)
- [Reading a DD-214](#)
- [Using the HVRP Eligibility Tool](#)
- [HVRP Placement Strategies](#)
- [HVRP Verification of Employment](#)
- [Differences Between Participant Training and Supportive Services](#)
- [VPL 06-24 Appendix](#)
- [Building and Maintaining Relationships with HVRP Partner Programs](#)



Questions?

Thank you!

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