Case Management Video Training Series

Purpose:
This training series was created to:

1. Provide a systematic approach to case management for new staff.
2. Help case managers:
   a. Identify strong candidates for case management
   b. Develop a holistic view of the household/client
   c. To develop goals with incremental steps for increased accountability for both the client and the case manager
   d. Track outcomes
3. Comply with [TAC §5.207(3)]. The forms or systems utilized for each case management component may be manual or electronic forms provided by the Department or manual or electronic forms created by the Eligible Entity. At minimum, any forms are to contain the same information as the ones provided in this training series.

Instructions:
The series consists of 7 videos that build upon one another. Staff can view the video series together, or staff can view the videos individually and then convene as a group to discuss the application of the training. The Department recommends grouping the videos into 3 sessions, grouped below:

Session 1:
- Outcome Scale (3 minutes 30 seconds)
  o Practice building an Outcome Scale
- Outcome Matrix (8 minutes 15 seconds)
- Client Questionnaire (5 minutes 53 seconds)
  o Complete a Client Questionnaire and Plot on the Outcome Matrix
  o APPLICATION: See “Homework”

Session 2:
- Willingness (5 minutes 22 seconds)
- Screening Tool (4 minutes 19 seconds)
  o Case Management Screening Questions. Read through the questions. When working with clients, reword the questions to better fit how you speak with clients.
- Service Plan Agreement (8 minutes 27 seconds)
  o Case Management Service Plan
  o APPLICATION: See “Homework”

Session 3:
• Follow Up and Case Closure (12 minutes 40 seconds)
  o The “Job Search Log” and “Goal Tracker” are tools that you may want to provide clients for self-tracking.
  o The content in the rest of the forms is required documentation; review each:
    1. 30-60-90 Day Follow Up
    2. Case Management Closure
    3. Client Satisfaction Survey
    4. Evaluation of Case Management

• As you view this series, please submit any questions or comments through the Department’s online link: https://tdhca.wufoo.com/forms/request-for-ca-program-assistance/. The Department will respond to each question and will post the questions and answers on the website at: http://www.tdhca.state.tx.us/community-affairs/csbg/case-management-training-series.htm under the Question & Answers tab.