CASE MANAGEMENT BEST PRACTICES

- Online Resources: use the EST Resources page for required Client Note templates, helpful Forms, Tools and Process Documents.

- Caseload report: use it to ensure all of the clients are yours and that none are missing from your report. Initialize cases that show "not initialized" and enter activities. Use it to identify exemptions, penalties, open/closed/pended/denied cases, 2P families, etc. Also, use it to write notes regarding clients. i.e., actions to take, last FSSP, when FPR is due, if child care is needed, etc.

- Participation Expectation: is based on 40 hours of participation per week to mimic the workplace. Exempt clients are expected to participate up to the amount they are allowed and able.

- Call clients: for job referrals, non-participation, verify work hours, re-engage, debrief work search, resolve crisis, discuss solutions,

- Send mail: for remote clients, mailing everything is the norm. For other clients, consider sending mail when EIS notices are ignored or they don't answer the phone. You might use letterhead instead of an EIS notice. And, try handwriting their name and address on the envelope to personalize it. Send self-addressed stamped envelopes for the client to return items.

- CWE: promote participation in volunteer activities during their first appointment.

- FSSP: in the additional information area on page 2, consider adding your name, phone number, number of months of TA used and a reminder to submit timesheets.

- Supportive Services: discuss alternatives supportive services as well as their ability to contribute to the expense. Review their budget. Have they discussed getting help from friends, family, community agencies, etc.?

- Partners: if the client is accessing services from other agencies, have a joint meeting.

- Work Search: only 12 weeks of work search count for participation rates in the past 12 months. However, many times it is appropriate to have a client in work search for a longer or shorter timeframe. You need to review what is appropriate for each individual client. Are they on the right track to increasing income? Are they eligible for a raise? Is it time to seek better work? Does their work search need to be more structured? Are they providing timesheets for accountability? Do they need help with a resume, interviewing skills, how to dress for success, etc.?

- Penalties: reengage early. A penalty resolution home visit can be done any time before progression is recommended. Don't wait until the third month as they are only removed from participation rates the first 3 months of penalty in the last 12 months.

- Barrier Resolution: discuss what is preventing the client from participating. Make appropriate referrals. If attending medical appointments, have them complete the medical timesheet and get verifying signatures. Enter hours for "B" codes.

- Client Notes: enter a client note each time you speak with a client. If a client note is not entered, it didn't happen.

- Work Activity Verification: refer to eligibility case notes, obtain paystubs, call the employer, use The Work Number, check Career Ready, check ALEXsys and debrief work search hours, gather timesheets, enter all hours of participation even if a client is exempt or in penalty.

- High School: clients under 20 years old who attend high school meet the measures if the hours are entered.

- Closing cases: enter work activities by the 20th of the following month and close the case after the 20th.

- Resources: work with coworkers to build a file of frequently used resources. Familiarize yourself with all resources available on the EST Resources page.

- Training: participate in all available training, review previously recorded 1 Topic training and new hire videos.

Note: *see next page for a typical day in the life of a new case manager.*

A DAY IN THE LIFE OF A NEW CASE MANAGER

Case Managers have latitude in arranging their schedule within their established work hours in order to accomplish the duties of their position. The schedule below is a guideline of what a typical day might look like after six months on the job. It can be re-arranged to fit individual preferences and needs. The interview time slots are simply a guideline. As a new employee, you may only have one appointment per day. As you gain experience and increase your caseload size, you might book appointments closer together and for shorter timeframes.

The interview times will fluctuate. During the first 10 days of the month, you need block time to accomplish Work Activity Verification. Toward the end of the month, you need a few hours to issue childcare requests. You will also need time to participate in training and meetings, resolve crisis, issue supportive services, respond to supervisor requests, etc.

8-8:30	Log onto CMS, EIS, Snap, Outlook, ALEXsys and the EST resource page Review Snap calendar for daily appointments, make reminder calls Listen to telephone messages and return calls Review e-mails and respond Check ALEXsys for job openings for your work ready clients; call with referrals Complete training activities as assigned by supervisor On Mondays, print out caseload list from document direct
8:30	Conduct interviews: EA's, FSSPs, Debriefings
10:00	Conduct interviews: EA's, FSSPs, Debriefings
11:30-12:00	Complete unfinished client notes Work on unfinished tasks from the 8-8:30 timeslot
12-1:00	Typical lunch break
1-1:30	Complete unfinished client notes Work on unfinished tasks from the 8-8:30 timeslot
1:30	Conduct interviews: EA's FSSPs, Debriefings
3:00	Conduct interviews: EA's, FSSPs, Debriefings
4-4:30	Complete unfinished client notes Work on unfinished tasks from the 8-8:30 timeslot