

IDVR Vocational Rehabilitation Counselor Training Series Case Management and Caseload Management

Welcome

Welcome to the Idaho Division of Vocational Rehabilitation Counselor Training. This training is provided by New Hampshire Department of Education, Bureau of Vocational Rehabilitation, and Interwork Institute of San Diego State University. It is part of the Agency's effort to provide readily available training support to vocational rehabilitation counselors. For further information contact: shannon.wilcox@vr.idaho.gov

Introduction

In this module you will learn how your case management skills impact you, the participants you serve and the agency, and the importance of developing sufficient organizational and time management skills to effectively manage your cases.

In addition, you will learn the importance of making accurate case entries, who may use case information, and how to write effective case notes.

Case Management

Focus of the Section

VR case management is a complex, goal-oriented process that provides an organized way to deliver VR services. It involves evaluation, assessment, planning, coordination, implementation, and monitoring.

Characteristics of Case Management

Case management is the work done on behalf of one client and focuses on meeting required timelines for an individual case. From the initial intake through case closure, clients should understand their role and the counselor's role in the VR process, and the purpose of each step of that process.

Some characteristics of good case management include:

- Scheduling appointments as needed, with as little delay as possible
- Starting appointments on time, to the extent that it's possible
- Returning client calls and emails in a timely manner
- Anticipating things the client may need, and bringing those up in discussion

- Following through with things you have promised to do
- Reaching out to the client regularly to maintain engagement in VR service provision.

Good VR case management encourages participants to take responsibility for their decisions, actions, and the resulting outcomes while the VR counselor facilitates the process. Good case management also includes the counselor taking responsibility to follow program requirements and federal and agency deadlines. Case management is also characterized by advocacy, communication, and resource management that promote quality and cost-effective interventions and outcomes.

Caseload Management

A caseload is all cases assigned to one counselor. When working on multiple cases, effective caseload management helps to promote the efficient delivery of personalized vocational rehabilitation services to numerous participants who are striving to obtain their vocational objectives. It involves movement of all cases assigned to the counselor from one case status to the next. The counselor must recognize and act when appropriate movement is not taking place and facilitate forward movement toward appropriate vocational goals or, if necessary, toward case closure. Ensuring that no case "falls between the cracks" is a job expectation.

Managing Multiple VR Cases

Caseload management is multi-faceted. To effectively manage multiple VR cases simultaneously, it's important for counselors to know the rehabilitation process, resources, vendors, and community partners. They must understand policy, practices, and disability issues to provide services, make decisions, and meet employment outcome goals. They must set priorities so that all participants are served appropriately, and they must understand and adhere to policies, organization practices, and documentation requirements.

Effective Caseload Management

If caseload management is poor, some participants will not receive services in a timely manner, or they may not receive appropriate services. Participants' employment outcomes may be negatively impacted, and required documentation may not be in the file. A high risk of noncompliance with policies, procedures, and program regulation is present.

When counselors effectively manage their caseload, individual cases receive timely attention, participants receive services in a fair and consistent manner, employment outcomes are positively affected, and agency time and resources are not diverted to

correcting case documentation deficiencies. Counselors also experience greater job satisfaction and less work-related stress.

Organization and time management skills enhance a counselor's ability to effectively manage multiple cases simultaneously. Counselors who do not already possess effective caseload management skills will work with agency trainers and their supervisor to develop skills and/or strategies to help them effectively manage individual cases and their caseload as a whole. Once good case and caseload management skills are demonstrated, counselors have the autonomy to develop the most effective system for their work style.

IDVR counselors have access to caseload management tools to help manage their caseload. In addition, employing the following strategies as part of your daily workflow can help manage caseload activities and maintain compliance with program requirements:

- Prioritizing activities by order of importance
- Blocking out time to work on tasks
- Maintaining a reasonable number of appointments per week
- Budgeting time to complete follow up activities from participant appointments (case documentation, follow up calls, etc.)
- Scheduling challenging tasks for the time of day when you feel most energized
- Minimizing distractions while working on important tasks
- Breaking complex tasks into manageable pieces
- Setting participation expectations and boundaries with participants
- Collaborating with paraprofessional staff in division of caseload duties

Good case and caseload management skills are developed over time with practice and an understanding of the scope and limits of VR services. IDVR has multiple ways for counselors to keep track of crucial case activities and deadlines. Your trainer will work with you to become familiar with caseload management tools and reports, and how to use them to develop an effective system to manage your time effectively and meet agency and federal requirements in an efficient and effective way.

Lesson Completed

You have completed this module. Click this [link](#) to complete the end of course quiz.