

Basic Case Management Roles and Responsibilities

For New Personal Agents and Services Coordinators

This next hour.....

- We are going to cover:
 - Medicaid's expectation for Case Management Services
 - Oregon's Standards and Procedures for Case Management Services
 - Tools to help with critical thinking

How Medicaid defines case management

- **§440.169 Case management services.**
- (a) *Case management services* means services furnished to assist individuals, eligible under the State plan who reside in a community setting or are transitioning to a community setting, in gaining access to *needed medical, social, educational, and other services, in accordance with §441.18 of this chapter.*

Oregon's Standards & Procedures for Case Management Services

Level of Care

ISP

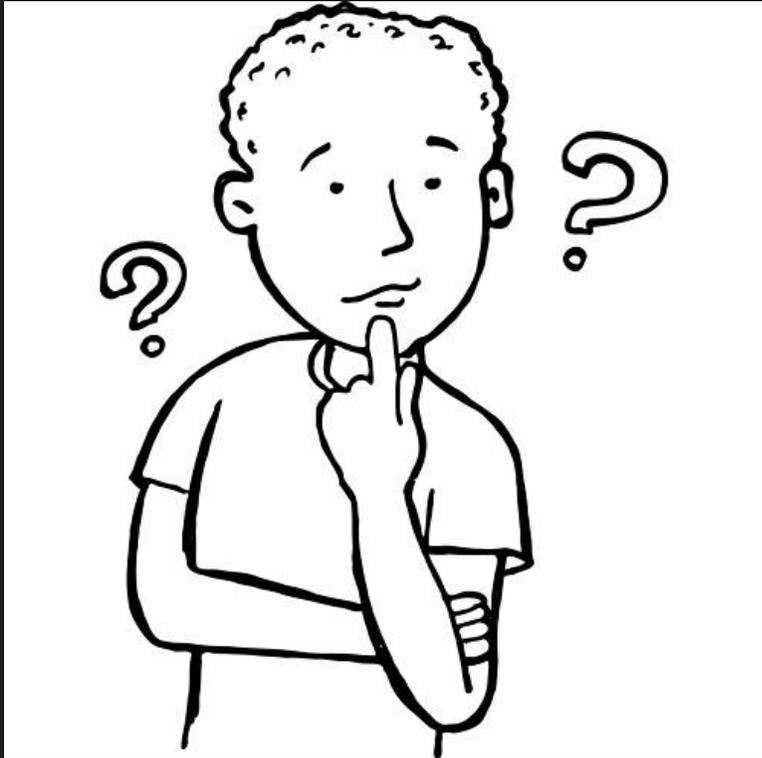
Monitoring ISP

Monitoring
Health & Safety

Assistance in
accessing and
obtaining
services

Reporting Abuse
and providing
protective
services

Level of care and more.....



Level of Care indicates eligibility for I/DD Services

Individualized Assessment of Support Needs

Risk Identification Tool

Development of Oregon's ISP

- New ISP Format for all Oregonians with I/DD receiving Community First Choice and/or Waiver services
 - Facilitates & Assures development of the ISP (includes Residential Specialist, CIIS Services Coordinator)
 - Oversight of the ISP process
 - Final responsibility for the accurate completion of all forms
 - Assuring that the plan meets the person's current service needs and complies with requirements for the chosen service settings and funding.
 - SC/PA authorizes the ISP

Monitoring the ISP

Desired
outcomes

Updating Person
Centered Information

Employment
Outcomes

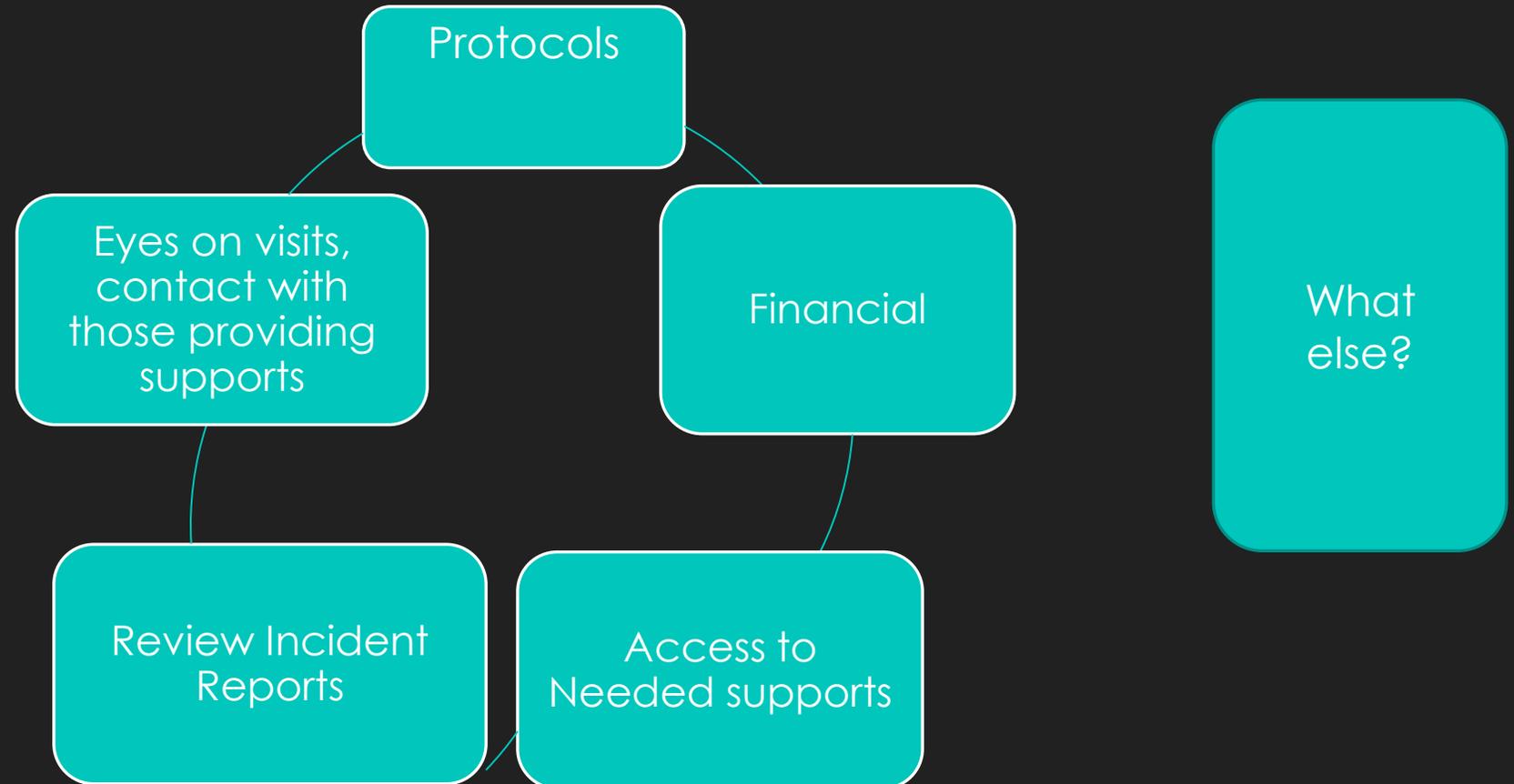
Offering
choices

Regularly reviewing
provider action plans

documenting

Minimally a
quarterly reciprocal
contact

Monitoring Health & Safety



Assistance in accessing and obtaining services

- Accessing Medicaid financial benefits
- Assisting the person in obtaining legal services
- Discussing with family and individuals their particular needs and interests
- Accessing supplies needed for children living in their family home
- Providing information regarding local opportunities that are available to all
- Providing contact info to Home Care Commission to obtain personal support workers
- Referrals to housing entities
- Providing information and timely referral for services available from other agencies
- Assisting a person to obtain transportation services

Reporting Abuse and Providing Protective Services

- *Assessing the need for protective services which may include: determining the ability of the adult to understand the nature of the protective service and his or her willingness to accept services; coordinating evaluations to determine or verify the adult's physical and mental status.*
- *Assisting in, and arranging for appropriate services and alternative living arrangements.*
- *Assisting in or arranging the medical, legal or other necessary services to prevent further abuse.*
- *Providing advocacy to assure the adult's rights and entitlements are protected.*
- *Processing the information, developing conclusions as a result of the investigation, making recommendations, and adjusting the individual plan if necessary to support recommendations.*
- *Monitoring for the implementation of the report recommendations.*

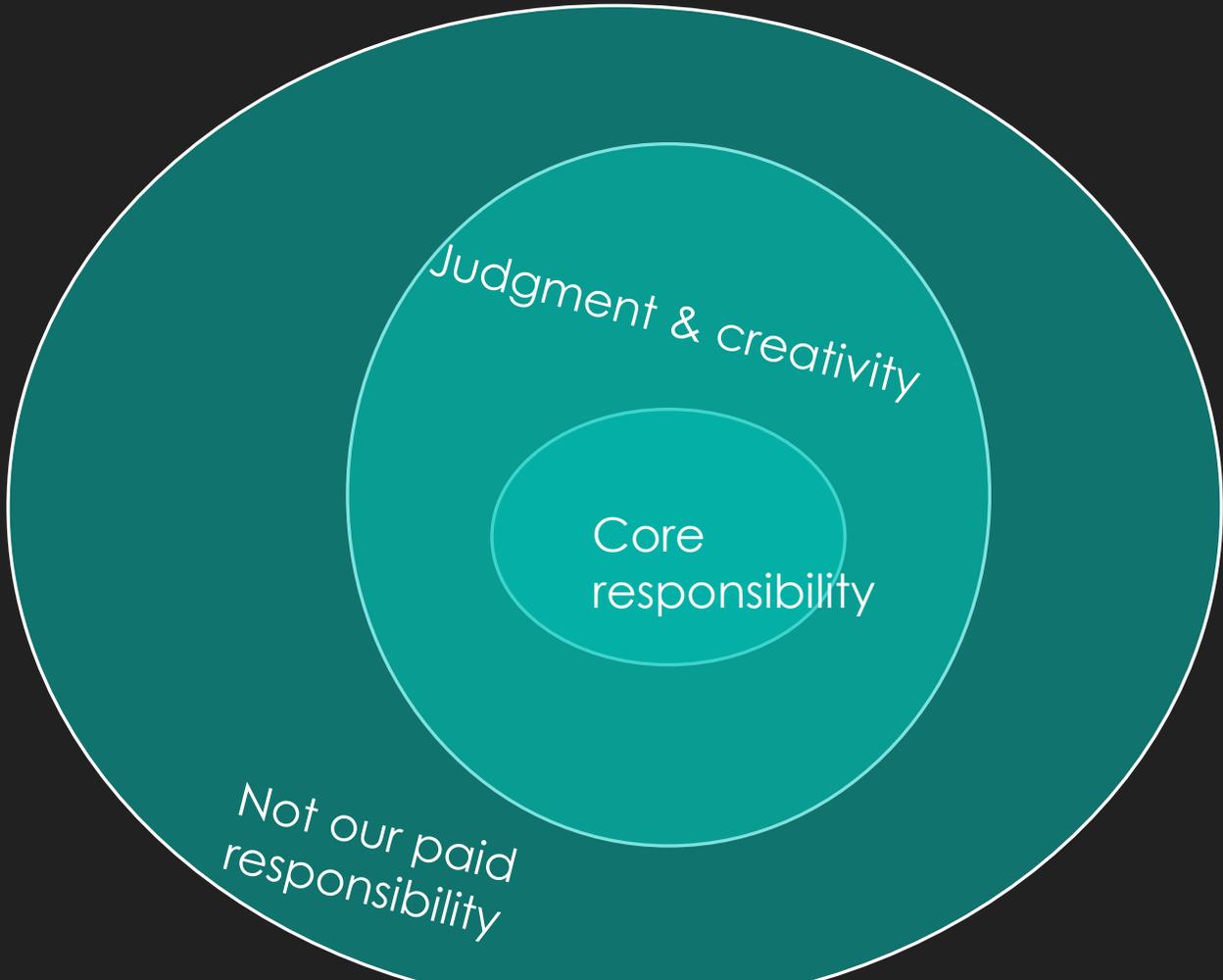
Tools to help with critical thinking

The Donut

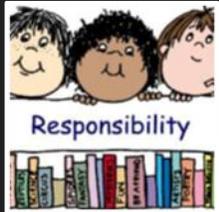
Important TO and For

What's Working and Not Working

Quick Glimpse



Core Responsibilities----- Using the Donut Sort



What it does

- Identifies specific responsibilities
- Core responsibilities



- Using Judgment and creativity



- Not paid responsibility

Core Responsibilities----- Using the Donut Sort

How this tool helps

- Helps you know where you can be creative without fear

- Clarifies roles of different players supporting people and families

- Can inform when planning In Home supports

Let's pick a task.....



- What are my core responsibilities tied to this task?



- Where can I use judgment and creativity?



- What is not my paid responsibility?

A quick glimpse of important to and for

Important TO

Important FOR

What do we need to learn or know?

Sorting Important to and for

- What it does:
 - Sorts what's important to us....what makes us happy, content and fulfilled from my perspective
 - Sorts what is important for usour health, feeling safe, being valued
 - Finding the balance between both

Sorting Important to and for– how this tool helps

As a way to think through a situation before deciding what should happen

As an everyday tool

When beginning development of an Individual's Support Plan

Working/Not Working from different perspectives

Staff Meeting Discussion

John's perspective

Sue's perspective

Alice's perspective

What's working

There is always an agenda

People feel comfortable talking

The meeting lasts for only an hour

What's not working

People don't contribute agenda items

Some people dominate discussions

The room is always cold

Sorting what's working and not working – What this tool does

- Offers opportunity for analysis of an issue or a situation across different perspectives
- Provide a picture of how things are right now

Sorting what's working and not working – how this tool helps

- Clarifies what to build on (maintain or enhance) and what to change
- Helps to look at what is working in a person's life
 - Medications
 - People providing paid supports
 - Any effort, activity or project is working
- Helps with mediation where there are disagreements

Tips

- Meet the person before reading their file
- Organize tasks on a large calendar – be mindful of timelines
- Lean on your colleagues
- Become familiar with the Administrative Rules
- Don't be afraid to ask questions
- Retain humor
- Remember why you came into this field