

Case Management & Co-enrollment

Session Goals

- Define Case Management
- Outline effective case management
- Establish understanding of co-enrollment
- Expel common myths of co-enrollment
- Establish understanding of how to record co-enrollment





Case Management

What is Case Management

 Case management is defined as wraparound services that motivate and support participants' progression towards self-sufficiency.

Career Coach vs Life Coach

As Career Coach/Specialist,

- our focus should be on what the participant needs to succeed with their employment goal.
- Any issues that need to be addressed **before** the
 participant can focus on an employment goal should
 result in a referral to a professional who can address the
 issues that the participant is dealing with.
- Being a career coach/specialist does not qualify us to be a "life coach."



Case management: Documentation

Ensure that all required paperwork and documentation are uploaded into Jobs4tn to support the services that you have provided to the customer. In order to case manage participants, Jobs4tn **must** be used to:

- Create participant applications
- Record provided services
- Upload supporting documentation to verify eligibility
- Provide case notes regarding interactions with participants.



Effective Case Management

Career specialists:

- Assess and triage participant needs
- Advise on current employment opportunities, growing industries in the area, and training options
- Provide career guidance

Case management should be participant-centered and focused on giving the customer the tools that are needed to become self-sufficient.



Effective Case Management: Organization

Develop a system of time management - use what works best for you.

- If you wait until several days after you have spoken with a customer, will you remember everything that you talked about when you case note?
- If you are rushed and feel overwhelmed, will you be at your best when you are meeting with a new customer to determine their needs?



Effective Case Management: Empathize

Listen to understand instead of listening to respond.

 When communicating with your participants, remember that they are going through a stressful part of their life.

 Stay in touch with your participants - if they do not think that you care about what happens to them, contact could be lost.





Co-enrollment

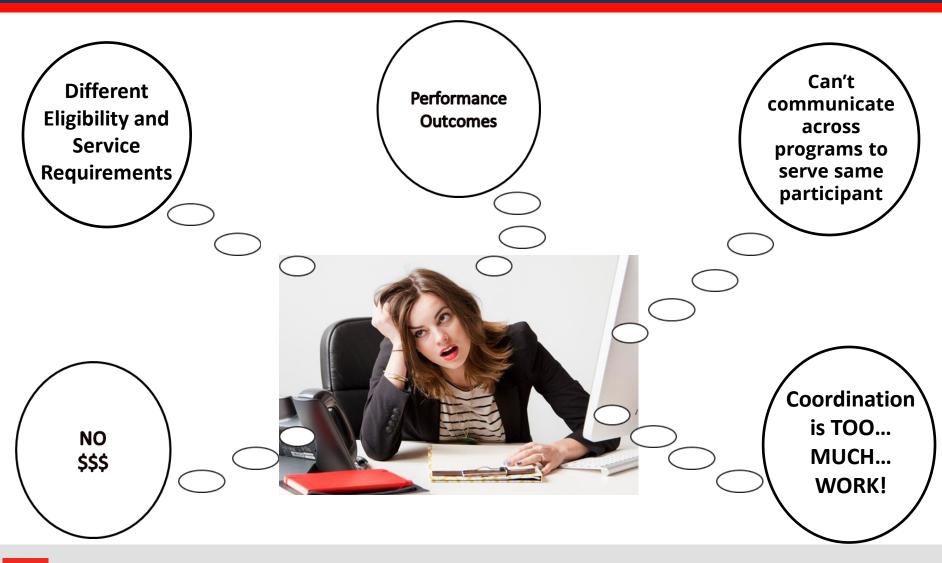
What is co-enrollment and why should we care?

Co-enrollment:

- **Is** the enrollment of a participant in more than one program at a time.
- **Ensures** that the individual receives the needed support to reduce the probability of drop-out due to barriers.
- Allows participants, who are co-enrolled, to have resources leveraged in a way that increases the probability to achieve long-term success.



Co-Enrollment Challenges





Let's Bust some Myths!

Myth/Barrier

Co-enrollment won't help my program's performance.

BUSTED!

Co-enrollment participant will count in the performance measurements for **all** programs they are enrolled in.



Myths continued...

Myth/Barrier

There is a lack of WIOA funding.

BUSTED!

There are a lot of ways to coordinate co-enrollment that are essentially a no-cost or extremely low cost burden for WIOA programs. (Resume writing workshops, financial literacy, etc.)



Myths continued...

Myth/Barrier

Co-enrollment is participant driven and, if there is no perceived benefit, they will not co-enroll.

BUSTED!

It is for the case manager to identify the needs of the participant and how they can be met across programs. Participation should be seamless for the participant.



Myths continued...

Myth/Barrier

Having to see multiple case managers creates a burden for the participant.

BUSTED!

Challenges to infrastructure should not determine case management strategies. Bridge the Gap – create case staffing between both case managers to provide a seamless service delivery.



Co-enrollment is not...

It is not a means to duplicate services

It is not a means to "pass off" responsibilities



A Day in the Life of a Participant

Tiffany Evans –



- 22 years old
- Parenting
- Employed \$7.25/hr.
- part-time (20 hr./wk.)
- Receiving SNAP
- Tiffany is not sure what service she can receive, she just knows she hates her current job and needs more money.

Leveraging Resources

TAA/Title I Dislocated Worker/SNAP co-enrollment:

- While TAA focuses on the training that is needed for a participate to be self-sufficient, SNAP benefits can also assist with transportation and child care (which is a new development) to support the he/she through training.
- Blending all three programs (TAA, SNAP and Title 1
 Dislocated Worker) can be beneficial to the participant when one program may not be able to provide for his/her
 needs, the other programs may be able to assist.



So, how do we ensure that our efforts are documented in the Case Management System?

Step 1: Go to the Program application you are enrolling the individual in.



Apps: 1

Create Title I - Workforce Development (WIOA) Application



LWDB: 73 - Southeast Tennessee

Onestop: 660 - American Job Center -

Dayton * NEW *

Open/Total Activities: 4 / 14

Application Date 02/01/2018

Participation Date: 02/01/2018

Closure Date: N/A

Exit Date: N/A



Step 2: Expand the application. Find Partner Programs tab.

☐ Eligibility Summary	
■ Participation	02/01/2018
■ Activities / Enrollments / Services	14
☐ Measurable Skills Gain	3
■ Partner Programs	0
Add/Edit Partner Programs	
■ Literacy & Numeracy	0



This is the list of Partner Programs within this section that apply to TN currently.

- Homeless Veterans' Reintegration Program
- Job Corps
- Other WIOA or non-WIOA Programs (Not in VOS)
- Employment First State Leadership Mentoring Program (EFSLMP)
- Intellectual and/or Developmental Disability Program
- Mental Health Program
- Reintegration of Ex-Offenders (Adult & Youth) Program
- Senior Community Service Employment Program (SCSEP)
- Vocational Education (Carl Perkins Vocational and Applied Technology Education Act)
- Vocational Rehabilitation and Employment (VR & E) Services (Veteran's VR)
- Vocational Rehabilitation Services (Parts A and B of the Rehabilitation Act of 1973)
- YouthBuild



Step 3: Click the Add/Edit Partner Programs link.

Activities / Enrollments / Services	28
Measurable Skills Gain	1
□ Partner Programs	0
Add/Edit Partner Programs	
⊞ Literacy & Numeracy	0
⊞ Youth Goals	0
⊕ Credentials	2
⊞ Add Employment	1

Step 4: Go to the section and complete the appropriate partner program applicable information.

Partner Programs	
Please indicate if the individual received se	rvices from the following partner programs during program participation.
H-1B Funded Program:	Yes No Participant did not self-identify
H-1B Funded Program Grant Number (<i>If unknown, enter all 9s.</i>):	
	Format: AA-99999-99-99-A-99
Homeless Veterans' Reintegration Program:	○ Yes ○ No ○ Participant did not self-identify
Homeless Veterans' Reintegration Program Grantee:	
	Format: 99999
Indian and Native American (INA) Programs:	○ Yes ○ No ○ Participant did not self-identify
Indian and Native American Programs Grant Number (If unknown, enter all 9s.):	
	Format: AA-99999-99-A-99



Effective Case Management Data Capture

No Activities,

- participation never happened
- performance outcomes will be null
- Program funds could be cut,

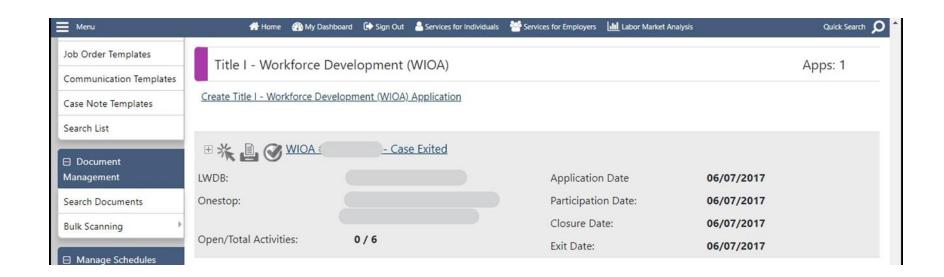


Effective Case Management: Activity Dates

Pay attention to activity dates - System closures of **all** activities result in the case file **exiting before** we are done assisting the participant.

- Projected Start Date
- Actual Start Date
- Projected End Date

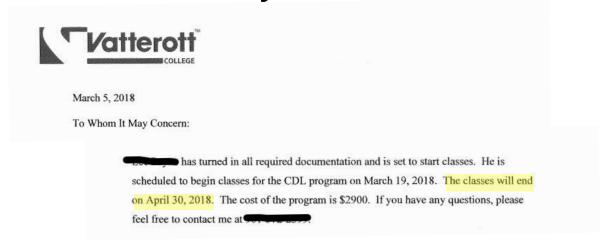
System closures of all activities result in the case file exiting



Actual begin dates must be entered or activity will System Close

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
S	300 - Occupational Skills Training - Approved Provider List (ITA)	0	Adult	10/16/2017	N/A	01/31/2018	<u>10/16/2017</u> System Closed
928	102 - Initial Accorrment	@	Adult	05/00/2017	05/00/2017	05/00/2017	05/00/2017

Projected End Dates may be extended.



Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
O	205 - Develop Service Strategies (IEP/ISS/EDP)	0	Adult	03/19/2018	03/19/2018	07/30/2018	Close
C	102 - Initial Assessment	0	Adult	03/19/2018	03/01/2018	05/01/2018	05/01/2018 Successful Completion
O	300 - Occupational Skills Training - Approved Provider List (ITA) VATTEROTT CAREER COLLEGE	0	Adult	03/19/2018	03/19/2018	07/30/2018	Close



			Grant	Begin Date	Begin Date	End Date	Date
C	211 - Referred To WIOA Partner Program (AE,TAA,VR or WIA Title I) Tennessee Dept of Labor and Workforce	W	TAA	N/A	07/18/2017	07/18/2017	07/18/2017 Successful Completion
0	331 - TAA - Approved Travel in Training Tennessee Department of Labor	0	TAA	09/05/2017	09/05/2017	04/23/2019	Close
0	300 - Occupational Skills Training - Approved Provider List (ITA) TENNESSEE COLLEGE OF APPLIED TECHNOLOGY AT PULASKI (EAST COL	w .	TAA	09/05/2017	09/05/2017	04/23/2019	Close
0	205 - Develop Service Strategies (IEP/ISS/EDP) Tennessee Dept of Labor and Workforce	0	TAA	07/13/2017	07/13/2017	06/30/2019	Close
C	125 - Job Search/Placement Asst., inc. Career Counseling Tennessee Dept of Labor and Workforce	W	TAA	07/13/2017	07/13/2017	07/13/2017	07/13/2017 Successful Completion
C	110 - Attended Rapid Response Tennessee Dept of Labor and Workforce	0	TAA	07/13/2017	07/13/2017	07/13/2017	07/13/2017 Successful Completion
C	107 - Provision Of Labor Market Research Tennessee Dept of Labor and Workforce	0	TAA	07/13/2017	07/13/2017	07/13/2017	07/13/2017 Successful Completion
C	102 - Initial Assessment Tennessee Dept of Labor and Workforce	W	TAA	07/13/2017	07/13/2017	12/30/2018	07/13/2017 Successful Completion



Activity dates must match the supporting documentation.

- Eligibility documents
- Case notes
- Training documentation
- Credentials







