

## **Case Management Training Feb 9<sup>th</sup> – New Cases, Assessments, and BCP Standards**

### **Objectives:**

- Establish practice/protocol for new cases, specifically completing assessments and case plans within 60 days
- Gain compliance with OAR
- Brainstorm and discuss practical strategies to assist with 60-day compliance goals
- Identify barriers to achieving 60-day compliance
- Improve our dashboard numbers and reflect our statewide impact

**Materials:** OAR handouts (2), office visit progression handout, white board or flip chart

### **Lead-in/role clarification and expectations:** (5 to 10 mins) (Mark)

- Case management team role – coaching and improvement
- Expectations for today's training

### **Introduce OARs:** (10 to 15 mins) (Mark) - Handouts

- OAR 291-078-0020 – risk assessments
- OAR 291-078-0026 – case planning

### **Office visit progression:** (10 to 15 mins) (Steve) – Handout

- Office visits expected weekly until a case plan is completed
- Contact standards after assessments and case plans completed

### **Break:** (10 mins)

### **Identify what is working:** (10 to 15 mins) (Andrea) – white board or flip chart

### **Barriers to achieving compliance:** (10 to 15 mins) (Shawnee) – white board or flip chart

### **Brainstorming and strategies:** (15-20 mins) (group)

- LSCMIs/WRNAs via phone
- Use four-pager and monthly reports for info
- Start risk assessments prior to seeing the probationer (e.g., criminal history)
- Utilize duty day (e.g., assessments via phone so free for duty calls)
- Protected time in schedule specifically for intakes/assessments
- Utilize outlook to stay organized

### **Q & A:** (10-20 mins) (group)