



Case Management/Services Coordination

Policy #2-2-1

Approved:

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I. POLICY

It is the policy of Jewish Family Services of Washtenaw County (JFS) to provide case management/services coordination planned to achieve the goals and objectives identified in each client's individual service plan.

II. PURPOSE

The purpose of this policy is to specify and disseminate the standards and procedures by which JFS provides effective and efficient case management/services coordination planned to achieve the goals and objectives identified in each client's individual service plan.

III. DEFINITIONS

Case management/services coordination- the provision of individualized direct services and service referrals that may include, as appropriate, but are not necessarily limited to:

- Individualized assessments
- Individual service plans (or FEFP)
- Efficient and effective linkages (including service coordination and access)
- Advocacy
- Crisis management

Clients - For the purposes of this policy, persons served.

Functionally Equivalent Form or Process (FEFP) - This concept addresses the potential duplication of client and staff effort that could result from the formal requirement of some contracts, grants and programs that specific forms or processes are used as a condition of JFS participation in the contract, grant or program. In the interests of efficient delivery of services, once it has been formally determined by the relevant Program Director or designee that the

III. DEFINITIONS (continued)

Externally-required form or process meets or exceeds the requirements established in the corresponding JFS form or process, that specific externally-required form or process shall be designated as *functionally equivalent* to the corresponding JFS form or process and may be used in lieu of it (in whole or in part).

For example, it has been determined that the ISS/Individual Service Strategy form required by the State of Michigan PATH program is the functional equivalent (FEFP) of the JFS ISP/Individual Service Plan and the JFS ESP/ Employment Services Plan and may, at the discretion of the caseworker, be used in lieu of the JFS ISP or ESP form (in whole or in part).

Linkage(s) - established connections and networks with a variety of agencies and other community resources that provide necessary services and opportunities identified in the Individual Service Plan (see JFS policy #2-1-3*Individual Service Plans*).

Service referral/information and referral - the referral of a person served to an agency or other community resource for services or resources which includes follow-up by the JFS caseworker, **as appropriate and as made practicable by the cooperation of the person served**, to assess the need for and to provide as necessary:

- Advocacy
- Supports to enable the effectiveness of the referral
- *(If it has been determined that “JFS client” status is appropriate)* coordination of the referred service/resource into the client’s overall case management, including adjustment and revision of the client’s ISP.

IV. STANDARDS

A. JFS case management is centered on the Individual Service Plan (ISP)(or FEFP) as developed with the client and as detailed in JFS policy #2-1-3*Individual Service Plans*.

B. Direct services and service referrals are designed and implemented to achieve goals, objectives and outcomes as identified and agreed upon in the ISP.

C. The intensity of case management is based on client needs as identified in the client’s ISP.

D. Caseworkers and other JFS service staff have a working knowledge of services and support systems that are appropriate and relevant to clients.

E. Based on client needs and professional assessment, case management includes:

1. Activities carried out in collaboration with clients.
2. Outreach to encourage client participation.
3. Coordination of, or assistance with, crisis management and stabilization.
4. Assistance with achieving goals as defined by clients.
5. Optimizing resources and opportunities through community linkages and enhanced social support networks.
6. Assistance with accessing transportation and stabilize in all areas of critical need that is appropriate to the client’s circumstances, abilities and preferences.
7. Assistance with exploring employment or other meaningful activity.
8. Provision of, or linkage to, skill development services to enable clients to perform daily living activities that may include budgeting, meal planning, personal care, housekeeping, home maintenance and other identified needs.
9. Evidence of linkage with necessary and appropriate financial services, medical or other health care, and other community services.

F. When multiple case management providers serve a client, a primary case manager is identified and there is coordination to facilitate service continuity and reduce duplication of services.

G. Acceptance standards, accessibility, case flow procedures, client rights and responsibilities and client records are addressed in the *Exhibit* and in the JFS policies cited in the *References* section of this policy.

H. In recognition of the evolving and responsive quality of JFS programs, additional detail about the JFS Case Management/Services Coordination Program is contained in the *Exhibit* to this policy.

V. PROCEDURES

A. ***JFS caseworkers will follow-up service referrals, as appropriate and as made practicable by client cooperation***, through activities carried out in collaboration with clients, outreach to encourage client participation, advocacy and coordinated communication with referral agencies and resources as made possible by client consent to release information.

B. ***Upon initiating service referrals*** caseworkers will, to the extent practicable, also institute agreements with the referred clients that promote feedback from the client to the caseworker regarding the progress and efficacy of the referral in obtaining the desired service or resource, including a ***signed release of information*** allowing for the exchange of relevant information between JFS and the agency or resource to whom the client has been referred (see JFS policy #1-3-2Confidentiality).

C. ***JFS caseworkers will***, as appropriate, ***assess the effectiveness of service referrals*** on an individualized basis for each client, document that assessment in the client record and determine the need for advocacy or other intervention and implement that determination in coordination with the client.

D. ***Caseworkers will maintain working linkages with community agencies and resources*** that facilitate professional cooperation in obtaining services and resources for clients through a variety of mechanisms such as routine non-interventional contacts, professional associations and networks, etc.

VI. EXHIBITS

Exhibit A- JFS Program Description: Case Management/Services Coordination

VII. REFERENCES

CARF 2021 Behavioral Health Standards Manual, Standard 3.B. Case Management/Services Coordination (CM)

JFS Policies: #1-3-2 Confidentiality
#1-4-1 Rights of Persons Served
#1-4-2 Responsibilities of Persons Served
#1-5-3 Program Descriptions: Content and Process

- #2-1-1 Acceptance Standards/Procedures for Services*
- #2-1-2 Records of Persons Served*
- #2-1-3 Individual Service Plans*
- #2-2-2 Employment/Career Services Program*

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