Case Management Techniques and Strategies Course Syllabus 2020

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Welcome to CLINIC's Case Management Techniques and Strategies e-learning course. We are excited that you will be participating in this course and look forward to working with you over the next four weeks.

This four-week course covers the basic components of effective case management techniques and strategies. Throughout the course, participants will learn best practices in intake procedures; case acceptance and closure; file maintenance; form creation and improvement. Participants will also learn about case management database systems, as well as strategies to create an effective policies and procedures manual to optimize program efficiency and minimize risk of liability.

Goals:

This course will enable you to:

1. Understand best practices in case management to maximize program efficiency and avoid liability and malpractice.
2. Develop a useful policies and procedures manual so that you can save time and money.
3. Develop a case management system to keep you organized and on top of deadlines.
4. Select cases intelligently to increase client satisfaction and avoid staff turnover.

Requirements:

To receive a certificate of completion students must:

1. Complete all required weekly quizzes
2. View or attend all wrap-up webinars

Every required activity has an activity box next to it. The activity boxes for the quizzes are automatically checked-off once you submit your answers. If the box is not checked off, then you have not submitted the quiz. The activity boxes for the webinars must be checked off manually, whether you watched the webinars live or a recording.

Tracking Your Work:

On the course site, on the far right column, you'll see a Course Completion Block. You can use this tool to track your course completion. The Course Completion Block is tied to the required activities for this course. Every little bar represents a required activity. Blue bars are activities that have not been completed. Green bars are activities that have been completed. If you are unsure if you have completed 100% of the coursework, you can take a look at your progress bar. If it's not at 100%, then you are missing coursework. You can hover over the blue bars and it will tell what activity you need to complete.

Quizzes:

A quiz is included in each unit consisting of true/false and multiple choice questions. The quiz, which is a very quick exercise, provides immediate feedback on your answer. The quiz is intended to be an easy way to test and/or reinforce your understanding of the material covered during that week.

Course Webinars:

The 30-60 minute live-webinars will be conducted on Wednesdays from 2:00 –3:30 p.m. Eastern Standard Time (EST). Because each live webinar is the concluding event of the week's work, it will be most beneficial to you if you attend the live webinar or listen to the recording AFTER you have completed the readings for that that week.

Registration links for each week's webinar are provided on the course site. If you do not receive a confirmation e-mail after you register, you can use the same registration link to directly-join the webinars. You can use the registration links as directly links anytime the live webinar is in session and up to 10 minutes prior to the webinar start time. Recordings of the live webinars will be provided on the course site within 24 hours.

Self-Directed Activities:

Each week of the course includes one webinar, described above, and self-directed learning activities including the following:

Reading: Each week of the course includes reading assignments. Plan on allowing at least an hour for the reading assignments each week.

Course Schedule:

Week 1: Case Management System, Database, Policies and Procedures

Introduction to the course; what is a case management system vs a database; developing policies and procedures.
Webinar: Wednesday, June 3, 2:00 – 3:00 EST
Instructor: Nathaly Perez

Week 2: Selecting and Opening Cases

Intake procedures; case selection, scope of representation and best practices.
Webinar: Wednesday, June 10, 2:00 – 3:00 EST
Instructor: Silvana Arista

Week 3: File Maintenance and Security

File maintenance; file location, access, and security; case tracking/tickler system and case notes; file retention/destruction.
Webinar: Wednesday, June 17, 2:00 – 3:00 EST
Instructor: Shaila Rahman

Week 4: Closing Cases and Standardizing Communications

Best practices and protocols; case closing letters, data tracking and record keeping; client survey and grievance procedures; large scale delivery models.
Webinar: Wednesday, June 24, 2:00 – 3:00 EST
Instructor: Leya Speasmaker