

Building the BEST Connections in Case Management

Purpose

Establish foundational case management practices for new W-2 Case Managers in the areas of assessment and Employability Plan development.

Objectives

Upon completion of this course, you will be able to:

- Discover the BEST approach to guide conversations with participants regarding:
 - assessment,
 - Employability Plan goals and activities, and
 - accommodations;
 - Recognize the ongoing connection between assessment and Employability Plan goals and activities;
 - Break down a goal into smaller goal steps using SMART goal criteria;
 - Explain the benefits of all goal types for workers and participants;
 - Compare activity code definitions using the W-2 Manual and example descriptions;
 - Select accommodations based on participant needs; and
 - Choose accommodation descriptions that include what, why, when, how, and who.
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Contact Information

Questions regarding this training material should be directed via your local agency process to the Partner Training Team,

Email: PTTTrainingSupp@wisconsin.gov

A contact person is available to answer e-mailed questions related to this training material, assist you in completing any activity that you are having difficulty with, and/or provide explanation of anything else about this training material.

Questions regarding W-2 production cases and systems should be directed via your local agency process to the BWF Work Programs Help Desk at:

Email: bwfworkprograms@wisconsin.gov

Telephone: (608) 422-7900.

W-2 Policy questions should be directed to your Regional Office staff.

DCF is an equal opportunity employer and service provider. If you have a disability and need information in an alternate format, or need it translated to another language, please contact (608) 535-3665 or the Wisconsin Relay Service (WRS) – 711.

For civil rights questions call (608) 422-6889 or the Wisconsin Relay Service (WRS) – 711.

Introduction

“A real conversation always contains an invitation. You are inviting another person to reveal herself or himself to you, to tell you who they are or what they want.”

~David Whyte

Six Word Memoir

Write down words or phrases to describe yourself.

Now, choose only six words as your memoir.



Assessment and Case Management

Assessment serves as a foundation for case management. As a Case Manager, you are constantly assessing, sometimes without even realizing it.

Defining Assessment and Case Management:

The three main Principles of Assessment:



Using the BEST Approach with Assessment Principles

B _____

E _____

S _____

T _____



Notes:

Do engage in collaborative conversation with participants.

Do not conduct an interrogation.

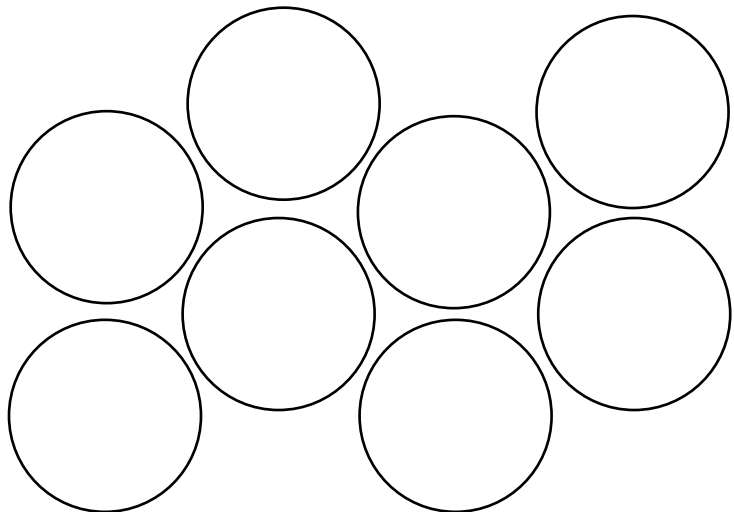
Balance

Create opportunities for you to gather what you need and for participants to discuss what they need.



Agenda Mapping

Notes:



Exploration

Allow time to further explore assessment results.



Active Listening

Observations and Notes:

What cues did you observe from the Talker when they were answering questions?

What types of follow-up questions did the Listener ask?

In what ways did the Talker's cues inform the Listener's questions?

What additional information did the Talker provide as a result of the Listener's questions?

Sensitivity

Acknowledge the participant's needs, yet challenge the participant.



Trust

Establish clear roles and responsibilities (the participant's and yours), and lay out a realistic picture of resources and options.



BEST Conversation – Tara’s Interview

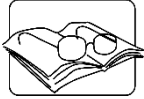
Examples of Balance:

Examples of Exploration:

Examples of Sensitivity:

Examples of Trust:

Applying Assessment Principles to W-2 Assessments



W-2 Manual:

1.3.3 Reasonable Accommodations for Participants

5.5.1.2 How to Use a Formal Assessment

5.6.1 Domestic Abuse Screening

Types of W-2 Assessments

Informal

Formal

Career

Job Readiness

Educational Needs

Vocational

Applying BEST to W-2 Assessments

Balance – Create opportunities for you to gather what you need and for participants to discuss what they need.

Exploration – Allow time to further explore assessment results.

Sensitivity – Acknowledge participants' needs, yet be able to challenge participants.

Trust – Establish clear roles and responsibilities (the participant's and yours), and lay out a realistic picture of resources and options.

Going Beyond What's on the Page

W-2 Assessments offer a good starting point with questions to learn about the participant. But, we need to go beyond what's on the page.

Asking Follow-Up Questions

Informal Assessment Pages

Notes:

Creating Open-Ended Questions

1. How is your job search going?
2. Did you do what you were supposed to do?
3. Did you have any job interviews this week?
4. Do you have a back-up plan for childcare?
5. Did you call the worksite to tell them you weren't going to be there?

Job Readiness Follow-up Questions

Work Preference Questions in WWP:

What kind of job would you like?

What about that job interests you?

What kind of training or experience do you think you might need for that job?

Can you name some places (companies or organizations) where that job may be available?

Are there any work situations or jobs you prefer to avoid?

What is your ideal work schedule?

Work Shift(s) (Select all that apply.)

Begin Time

End Time

How far are you willing/able to travel to get to work?

Travel Time:

Distance from Home to Work:

Work Preference Follow-Up Questions:

History Questions in WWP:

Tell me about your last job.

Tell me about a time you felt proud of something you accomplished.

What are your greatest strengths?

What areas would you like to improve on?

History Follow-Up Questions:

Application Questions in WWP:

Are you comfortable submitting an online job application?

Do you have a current resume and a cover letter?

Do you have three personal or professional references for a job?

Do you have the documents needed for employment (such as a social security card)?

Application Follow-Up Questions:

Interview Questions in WWP:

Tell me about your last job interview.

Is there anything you would not want a potential employer to see on your Facebook or other social media?

Do you have an outfit to wear to a job interview?

Interview Follow-Up Questions:

Contact Questions in WWP:

Do you have a phone number that employers can use to contact you?

Do you have access to voicemail or text messages on this phone?

Do you have an email address that employers can use to contact you?

Can you access your email on a daily basis?

Contact Follow-Up Questions:

Using Reflections and Cues

Reflections

1. Hear what the person is saying.
2. Make an educated guess about the person's underlying meaning or feelings.
3. Choose your direction.
4. Share your guess as a concise statement, *not* a question.

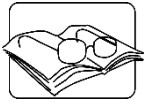
Example

Participant: "I really liked my last job. I think I was pretty good at it, too. I helped a lot of people."

Case Manager: "You're interested in finding a job in the same field." or "You enjoy helping people."

Cues

Formal Assessment Agreement



Wisconsin Works (W-2) Formal Assessment Agreement form (2565)

1. Who can complete a formal assessment?
2. True or False: You must complete a separate W-2 Formal Assessment Agreement form for each type of formal assessment needed.
3. In what ways can a Formal Assessment help Case Managers and participants make decisions?
4. How can you explain what 'accommodation' means to a participant?
5. Who pays for formal assessments?
6. True or False: Formal assessment information is confidential.
7. Who is responsible for helping the W-2 participant complete a formal assessment?
8. True or False: If a participant refuses to complete a formal assessment, their case will close.
9. What information do you use to make case management decisions when a participant declines a formal assessment?

DEPARTMENT OF CHILDREN AND FAMILIES
Division of Family and Economic Security

WDR

Wisconsin Works (W-2) Formal Assessment Agreement

Personal information you provide may be used for secondary purposes [Privacy Law, s. 15.04 (1)(m), Wisconsin Statutes].

Applicant / Participant Name [REDACTED]	Personal Identification Number [REDACTED]	RFA / Case Number [REDACTED]
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You could benefit from a formal assessment. A formal assessment is an appointment with a doctor, psychologist, counselor, vocational rehabilitation specialist, or other professional.

What type of formal Assessment do you need?

The formal assessment will gather information about your (W-2 agency will check all that apply):

- Expected short-term medical condition or injury: [REDACTED]
- Pregnancy
- Expected long-term medical condition: [REDACTED]
- Learning needs
- Emotional or mental health
- Alcohol or other substance abuse
- Vocational rehabilitation
- Other – Specify: [REDACTED]

How will a Formal Assessment help you?

The formal assessment results will help you and your Financial and Employment Planner (FEP) make informed decisions about:

- Your W-2 placement;
- Your employment goals and the activities that will help you reach your goals;
- Your ability to do training and education activities; and
- Any special services and work site accommodations that you may need.

What is an Accommodation?

Accommodations are changes that make it easier for you to do your W-2 activities. Here are some examples of accommodations and why the accommodation is needed:

- Giving you extra help understanding directions if you have a learning disability;
- Changing your start time if you are taking medicine for a health problem that makes you sleepy in the morning;
- Giving you a quiet workspace to reduce noise if you have a mental disability; or
- Assigning you to a dust-free work area if you have asthma or are allergic to dust.

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It is important for you to know that:

1. You do not have to pay for any formal assessments. The cost of formal assessments will be paid for by your health insurance (such as BadgerCare), the W-2 agency, Division of Vocational Rehabilitation or by another program.
2. Your information will be kept private. Information gathered from a formal assessment is confidential. It will only be used by the W-2 agency to help you in the W-2 program. If you move and apply for W-2 with a different W-2 agency, your formal assessment information will be shared with the new W-2 agency.
3. Your W-2 agency will help you complete a formal assessment. You have the right to ask the W-2 agency for reasonable modifications or accommodations to help you complete a formal assessment. Tell your FEP if you need help completing a formal assessment.
4. You can choose not to do a formal assessment. If you decide not to complete the formal assessment, you will not be penalized in any way. You will not be sanctioned or found ineligible for W-2 based on your decision to decline a formal assessment.
5. If you decline a formal assessment, your FEP will work with you to make all W-2 placement decisions and activity assignments based on the information that is available. However,
 - Your FEP may not have enough information to determine if you have a disability or other barrier to participation in the W-2 program; and
 - Your FEP may not be able to provide services or worksite accommodations that could help you.

Applicant / Participant must check one of the boxes below indicating whether s/he has agreed or declined to have a formal assessment.

- I agree to have a formal assessment. If I move and apply for W-2 with a different W-2 agency, my formal assessment information will be shared with the new W-2 agency.
- I decline to complete a formal assessment at this time.

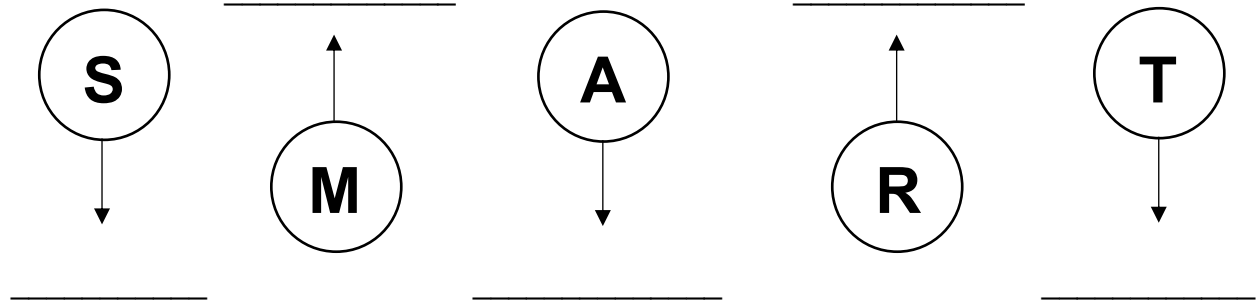
Applicant/Participant Signature or Telephonic Signature Interaction ID [Redacted]	Date Signed [Redacted]
W-2 Agency Representative Signature [Redacted]	Date Signed [Redacted]

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Applying Assessment Principles to Employability Plan - Goals

Goal Type	Case Manager Benefits	Participant Benefits
<p>___ R ___</p> <p>___ M ___ Y ___</p>		
<p>_____ Y</p> <p>___ P _____ T</p>		
<p>L _____</p> <p>___ R ___</p>		
<p>___ H ___</p> <p>P _____</p>		
<p>P _____</p>		

Smart Goals



Matching:

Specific	Knowledge, skills, aptitude
Measurable	What success looks like
Attainable	Determine length of time
Relevant	Clear and mutually understood
Time-bound	Does it matter to the participant?

Breaking Goals into Steps

Notes:

Colleague Q and A

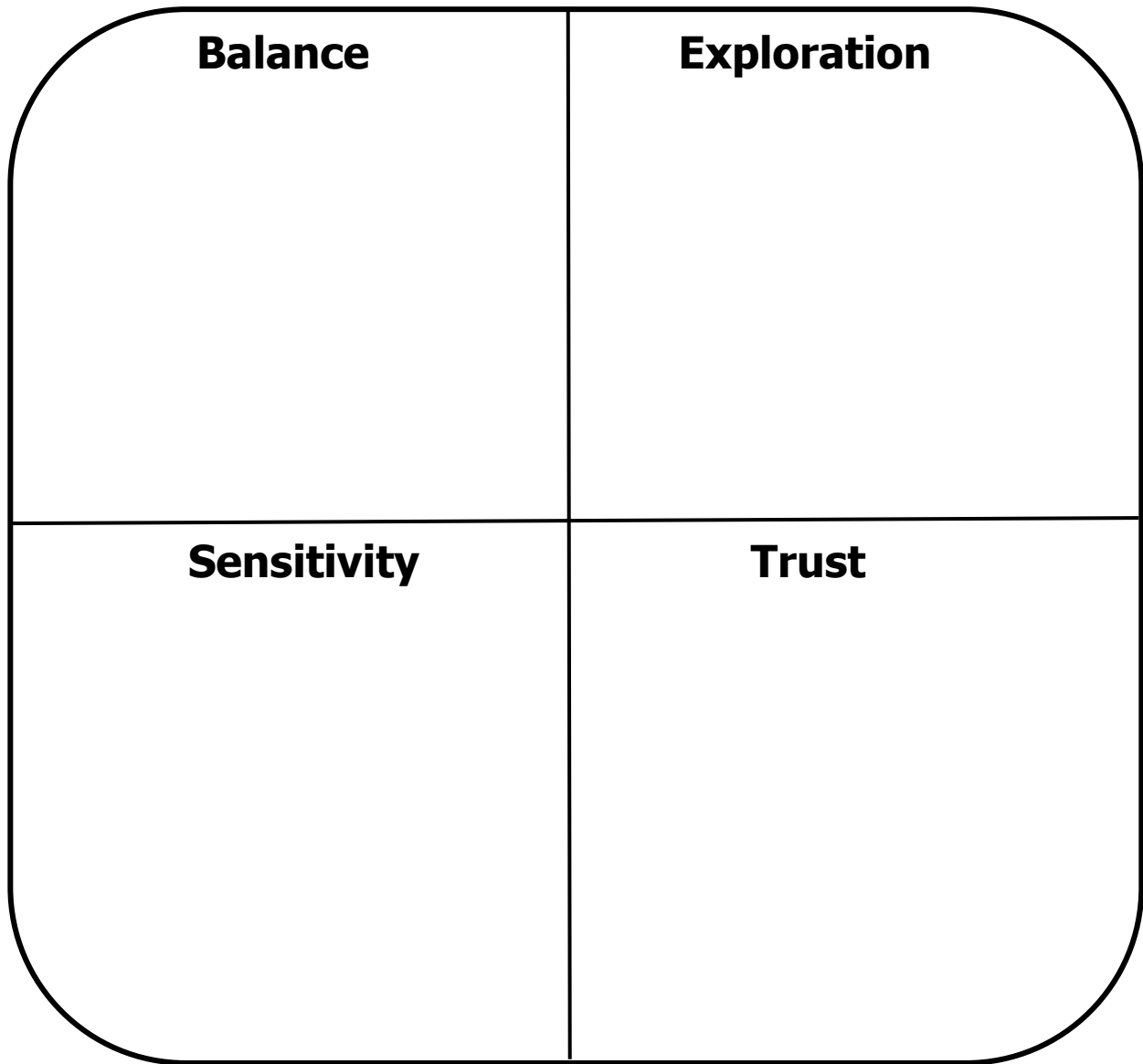
Take a moment and think about everything we discussed yesterday. Jot down 3 questions or observations you have.

1.

2.

3.

Using the BEST Approach with Goals



Follow-up Questions:

Conversational Interview - Goals

How does the Case Manager use the BEST approach?

What are the benefits of using the BEST approach in a goal setting conversation?

How would the conversation be different if the Case Manager did not use the BEST approach?

Using your phone, go to onetonline.org, type vet tech in the search bar at the top right of the screen, and click Go. Click Veterinary Technologists and Technicians from the occupation list. Review the information provided for this job, and write down three things you found that you would like to discuss with the participant.

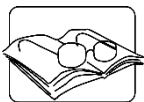
Applying Assessment Principles to Employability Plan - Activities

- Activities help participants achieve their _____.
- Goals direct the _____.
- Activity development is a _____ process between you and the participant.
- Take into consideration the participant's personal strengths and barriers identified through _____.
- The _____ has buy-in when they have a role in identifying activities.
- Activities are categorized under specific activity _____.
- The Activity Code _____ of the W-2 Manual lists all the activity codes, definitions, and examples.

WORD BANK

Codes	Collaborative	Goals
Activities	Assessment	Appendix
	Participant	

Activity Codes



W-2 Manual Appendix – Activity Codes

Activity	BE – Adult Basic Education (ABE)	GE – GED (General Education Development)	HE – HSE (High School Equivalency Diploma)
Example Activities			
Key Similarities:			
Key Differences:			

Activity	CA – AODA Counseling	CM – Mental Health Counseling	FC – Family Member Treatment/Counseling
Example Activities			
Key Similarities:			
Key Differences:			

Activity	ES – Employment Search	JS – Job Skills Training	WE – Work Experience
Example Activities			
Key Similarities:			
Key Differences:			

Activity	LF – Life Skills	PA – Parenting Skills	PD – Personal Development
Example Activities			
Key Similarities:			
Key Differences:			

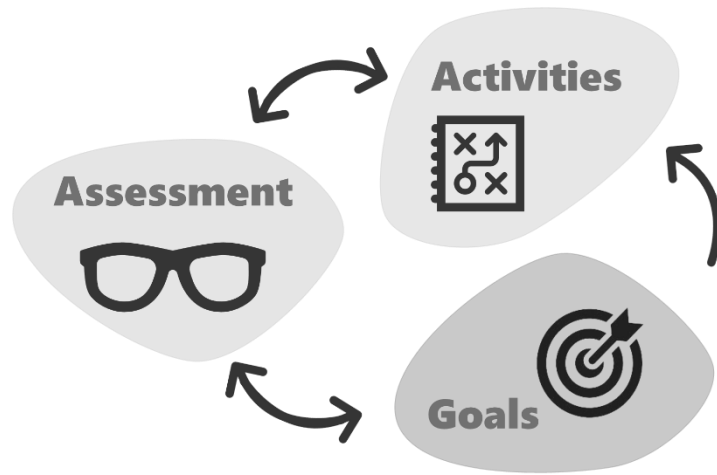
Activity	JS – Job Skills Training	TC – Technical College	TT – Technical College Study Time
Example Activities			
Key Similarities:			
Key Differences:			

Activity	MP – Ongoing Medical/Personal Care	PD – Personal Development	PR – Physical Rehabilitation
Example Activities			
Key Similarities:			
Key Differences:			

Activity	CE – Career Planning & Counseling	JR – Job Retention Services	MO – Job Readiness/Motivation
Example Activities			
Key Similarities:			
Key Differences:			

Activity	CC – Child Care Related Activities	DR – Driver Education	HR – Housing-Related Activities
Example Activities			
Key Similarities:			
Key Differences:			

Tying Activities to Goals and Assessment Information



Follow-up Questions:

Using the BEST Approach with Activities

Balance	Exploration	Sensitivity	Trust

Additional Examples of Using the BEST Approach with Activities:

Balance:

Exploration:

Sensitivity:

Trust:

Conversational Interview - Activities

How does the Case Manager use the BEST approach?

What are the benefits of using the BEST approach in a conversation regarding activity assignment?

How would the conversation be different if the Case Manager did not use the BEST approach?

How can the Case Manager use the BEST approach in future appointments when discussing activity progress with the participant?

Applying Assessment Principles to Accommodations

Accommodations are designed to give everyone an equal chance to do their best work.

Myth or Fact

Statement 1: Accommodations/Formal Assessment

W-2 Agencies must provide accommodations to participants only if a professional identifies accommodations in a formal assessment.

Statement 2: Handicap Accessibility

As long as your W-2 Agency is handicap accessible, you don't need to worry about accommodations.

Statement 3: Identifying Accommodations

The W-2 agency is responsible for identifying the accommodation the participant needs.

Statement 4: Providing Accommodations

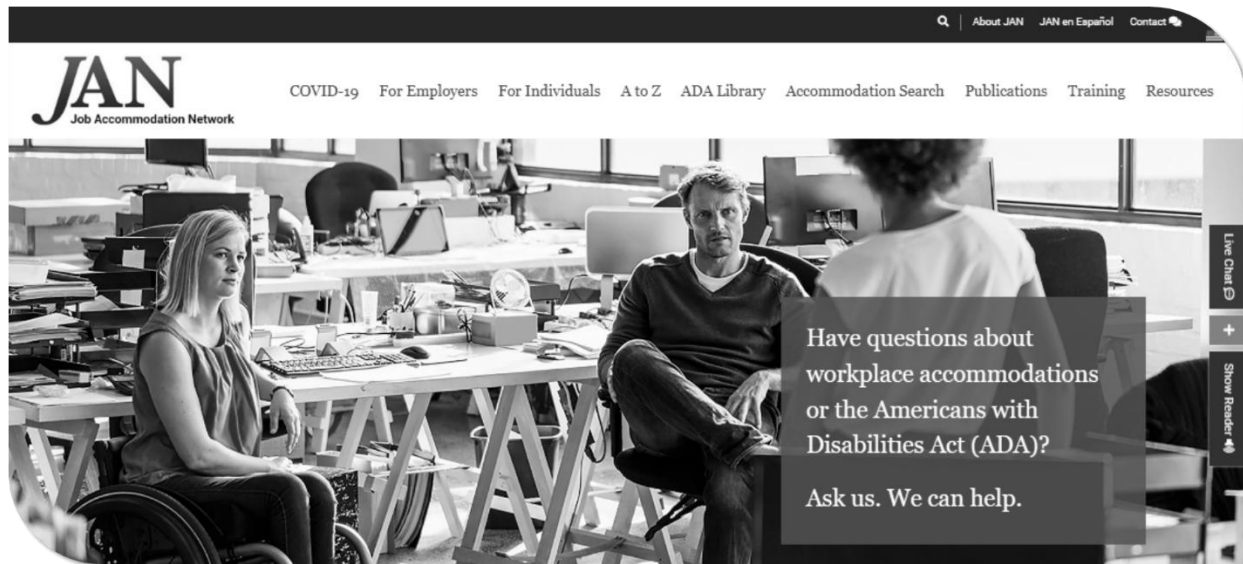
Providing accommodations usually involves making extreme modifications to processes or purchasing expensive equipment.

Statement 5: Modifying EPs

When a formal assessment identifies accommodations the participant needs, you must modify the participant's EP to include the services and accommodations.

Gathering Accommodation Information

A Resource for Accommodations: askjan.org



JAN is the Job Accommodation Network. Their website, <https://askjan.org/>, has information on the Americans with Disabilities Act (ADA), disabilities, and accommodation ideas for those disabilities.

Accommodation Descriptions

Elements:

What –

Why –

When –

How –

Who –

WHY

WHAT

Lynsey carries a **notebook** with her that is **filled with items she needs to complete** for her assigned activities. Using it helps her to **focus or refocus as needed**. **Allow her time to consult** her notes or to add notes **while participating in activities**.

Provide her a new notebook when needed.

HOW

WHEN

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03/03/23 126

Medical Conditions

A: Provide an area for Kara to set and plug in her personal desk fan while completing activities at the agency. She uses this as needed for temperature control.

B: Let Kara use a desk fan as needed for her medical condition.

Memory Deficits

A: Bianca sometimes struggles with recalling information she receives verbally. She needs to be allowed to record this information to help with her memory.

B: Allow Bianca to use the audio recorder on her cell phone to record verbal instructions, meetings, and workshop lectures so she can review the information.

Panic/Anxiety

A: Provide a place for Shantelle to sit that faces the door. This helps keep her panic/anxiety under control during appointments.

B: Shantelle needs the option to see the exit to any room while in public places. This can be achieved by providing her a seat/work area facing the exit or by using mirrors.

Concentration Deficits

A: Work with Holly to provide a 5-10 minute break, as needed, every hour or so when she is working on a longer task. This allows her to refocus and reorient with her task.

B: Provide a flexible schedule for Holly to help her pay better attention and deal with concentration issues. This could mean giving her shorter, more frequent breaks, or one, longer break during the day, as well as adjusting start/end times.

Visual Impairment

A: Terrell has a visual impairment of colorblindness. He does have an app on his phone that he can use to scan screens and documents that is somewhat helpful in identifying colors for him.

B: Terrell struggles to distinguish between certain colors when using a computer. Download and install Colorblind Assistant (free) on any agency/worksite computer he is expected to use to complete activities.

Applying BEST to Accommodations:

Balance –

Exploration –

Sensitivity –

Trust –

Making the Connection

Part One – Meet Courtney

What additional information would be helpful?

What are the topics you need to address at the appointment?

Part Two – Notes:

Part Three – Notes:

Wrap-up

One way I plan to use the BEST approach is...

In what ways were you inspired and encouraged by the level of commitment in this room?

“One good conversation can shift the direction of change forever.”

~Linda Lambert