NABITA Case Management Standards and Best Practices
Training & Certification Course Sample Agenda

Description:
Case Management Standards and Best Practices, a two-day course, provides an in-depth exploration of the NABITA Standards for Case Management. These standards were created with a focus on the non-clinical case manager position, or those using case management as a process for their BIT members in deploying interventions. The case management standards provide guidance within three focus areas: structural, process, and quality assurance & assessment. Faculty will provide in-depth instruction on the 24 case management standards including the foundational research for the standards as well as strategies for implementing the standards at your institution.

Learning Outcomes:
After completing this course, participants will be able to...
- Expand their understanding of case management as a defined process and/or position, with specific expectations related to standards of practice
- Learn approaches to ensure case management is effectively connected to the BIT
- Gain practical strategies for case management processes and 1:1 service delivery
- Develop an ability to confidently evaluate case management processes and identify opportunities for growth based on implementation of the standards
- Gain meaningful guidance for creating, augmenting, or improving case management functions at their institution

Course Topics
Case Overview
- History of Case Management
- Evolution and Development of Standards
- Case Management Models: Process vs. Position; Clinical vs. Non-Clinical

Structural Elements
- Philosophical Framework
- Information Sharing
- Mission and Scope of Services
- Training
- Position Structure
- Case Load
- Policies and Procedures
Process Elements
- Referrals
- Assessment
- Outreach

Case Management Direct Services
- Intake Appointments
- Developing Action Plans
- Follow-up Services

Case Management Indirect Services
- Referral and Service Coordination
- Collaboration and Consultation with Key Partners
- Integrating Case Management Services with the BIT
- Case Review and Case Monitoring
- Documentation

Marketing and Advertising
- Developing a Marketing Strategy

Quality Assurance and Assessment
- End-of-Semester and End-of-Year Reporting
- Program Evaluation
- Case Manager Supervision

Note: Each day will include one morning and one afternoon break (approximately 15 minutes each) and a one-hour lunch break. Training start and end times for in-person events are determined by the host site. All virtual training sessions take place from 10 AM – 5 PM ET unless otherwise specified.