Tip of the Week
June 12, 2019
Best Practice Recommendations for Case Management (Part I)

Case managers are responsible for information gathering, rapport building, crisis assessment, de-escalation, and more. On top of the various skills and techniques required of case managers, there are best practices to keep in mind through the various duties of the job. This two-part Tip of the Week series will explore 10 best practice recommendations for case management.

1. Establish the Foundations
What is the foundational philosophy for your work? What is/are the mission, vision, and values for your program? It is important to first answer these questions so you can be clear about what you do, who you serve, who you don't serve, and how you do your work. Additionally, your case management program should be tied to your BIT and follow the NaBITA Standards for Behavioral Intervention Teams.

2. Standardize Your Processes
Everything you do needs to be standardized; from your initial referral risk rating, to your outreach protocol, to your interventions, to your case closure process. This ensures consistency and equity in your work. You can start by establishing one rubric that your case management program and BIT will utilize for everything – your rubric helps guide all the other pieces of your case management program. I recommend the new NaBITA Risk Rubric, but you can also create your own homegrown model.

3. Create your Case Management Manual
This is tied to establishing the foundations, and gives focus to your program, sets boundaries, and provides clarity on programs and procedures. It is a great tool for training new members of the team or doing an assessment of your program.

If you don't have a manual yet, set time for you and key stakeholders to brainstorm institutional-specific information, collect (sometimes we simply need to write down what we have been doing) or create procedures, and gather related policies and resources.

If you already have a manual, be sure to review it annually for updates and revisions and incorporate contemporary topics and resources.

4. Establish Clear Reporting Processes
How are campus partners instructed to report to you? What content do you need from them? How is your program advertised? It is really important that campus partners are clear on how you help their students and how they can get students to you. NaBITA provides a great training video series for how to do this!

5. Licensed vs. Unlicensed: Being Mindful

Licensed practitioners often have a skill set that is helpful in a case management role. However, it is important to be clear about your role and what you can and can't do, which is dependent on your location (i.e. counseling center versus Dean of Students office).

It is recommended that licensed, non-clinical case managers be mindful of state law, be upfront with students about their role limitations, and do not present themselves as therapists.

It is also important for supervisors to be cognizant of the legal boundaries of those who are licensed and working in a non-clinical role.

Jamie Molnar, LMHC
Licensed Psychotherapist and Higher Education Consultant