

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 explores 10 best practice recommendations for case management. Part I of this two-part Tip of the Week explored the first 5 best practice recommendations for case management, and this week we will look at the remaining 5.

6. Establish or Work Toward a Dedicated Budget

Case management programs should be allocated a dedicated budget, as that indicates the importance of the program, defines it as a separate functional area, and allows for the tracking of unique and specific expenses. The budget should consider funding for areas such as technology, professional development, marketing, training, etc.

If you do not have a dedicated budget for your program, consider making it a key goal in your strategic plan for the department. Think about methods and campus partners you can network with to make this happen. Talk to your supervisor about how to work towards this goal.

7. Be Intentional: Staffing Considerations

Case management is a high-touch responsibility. Some cases involve an in-depth use of resources, and case managers are often utilized in urgent situations. High student-to-case manager ratios may not allow for effective support and can lead to simply triaging student situations rather than providing the care and support students need. When institutions of higher education have just one case manager, they should also consider how others are cross-trained to assist in times of high caseload, vacations, sickness, or times of unplanned extended absences.

8. Be Clear: Equitable Medical Leave of Absences (MLOA) Practices

Know your institutional policies! And if you are involved in this process on your campus, remember that Medical Leave of Absence policies should always: be written and accessible to all students, be the same process for physical and mental health conditions, and have an appeal process available. Additionally, be sure that your process can be individualized to meet the unique medical/mental health needs of each situation, within the parameters of the policy.

9. Title IX and Case Managers: Know Your Role

Here are some tips for case managers to keep in mind when involved with a Title IX complaint:

1. Keep in mind that individuals in non-clinical roles are mandated reporters for Title IX.
2. Ensure equity in your system and provide support for respondents if you provide support for complainants.

**Best Practice Recommendations for Case Management
(Part II)**

3. Avoid conflicts of interest. If your full-time role is case management, your position should be removed from the Title IX-related student conduct decision-making process.
4. Work in collaboration with campus or community victim advocate programs.
5. Get involved! Sit on or provide input to campus advisory boards dealing with Title IX issues.
6. Ensure you have the ability to secure student's appointments in on-campus counseling centers.

10. Use Your Data for Strategic Planning

Tracking program utilization and learning outcomes will help you understand the types of issues your students are facing, where/when/how you receive referrals, and systemic issues that may be occurring. Compare and contrast your data with national data from NaBITA and National College Health Assessment ([NCHA](#)). This is helpful in guiding how you can improve your program, advocate for resources, and develop new initiatives.

Jamie Molnar, LMHC
Licensed Psychotherapist and Higher Education Consultant