

WIOA
Professional Development
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Successful Case Management in a Virtual Setting
December 14, 2022

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Moderator



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Where is Your Local Area?



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Which partner do you best represent?




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Presenter



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Where We Have Been: Then and Now

MARCH 2020

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8						

DECEMBER 2022

SUN	MON	TUE	WED	THU	FRI	SAT
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31



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Building a plane (while flying)...

Adapted Quickly to Participant's Needs and Program Parameters

- Home office issues
- Participant technology challenges
- Case Management changes
- Intake and Assessment changes
- Delivery of training issues
- Program component issues: WEX, OJT, internships
- Placement issues


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Don't throw the baby out with the bathwater.

Virtual Case Management is here to stay, at least in some capacity.

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Workforce Lessons: Benefits



- More convenient
- More efficient use of time
- Reduced travel for participants
- Reduced childcare issues
- Could expand the customer base to those who couldn't come in for a specific set of appointments
- Added flexibility to the way we deliver services.
- Increased the skills of staff who had to begin using virtual technology such as Zoom, Teams, and other platforms.

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Telehealth Lessons Learned: Satisfaction



- The data showed that patients overall had positive experiences with telehealth and don't want to see it go away. Among those surveyed:
 - 79% were very satisfied with the care received during their last telehealth visit.
 - 81% said the provider was thorough.
 - 84% were confident their personal information was secure and private during the visit.
 - 83% believed the quality of the patient-physician communication was good.
 - 73% will continue to use telehealth services in the future.

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Who has access to technology

2020:

- KFF Health Tracking Poll 7 of 10 adults 65 and older have a computer, smart phone or tablet with internet access.
- 85 percent of adults 50-64-year-olds
- Virtually all 30-49-year-olds
- Pew Research 2020
 - The vast majority of Americans - 97% - now own a cellphone of some kind.
 - The share of Americans that own a smartphone is now 85%, up from just 35% in Pew Research Center's first survey of smartphone ownership conducted in 2011.
 - About three-quarters of U.S. adults now own a desktop or laptop computer, while roughly half own a tablet computer.



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Poll- Internet accessibility

- What percentage of your participants have a cell phone or laptop?
- What percentage have internet access at home?

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What is the Affordable Connectivity Program?



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Who Is Eligible for the Affordable Connectivity Program?

- Has an income that is at or below 200% of the federal poverty guidelines
- Participates in certain assistance programs, such as SNAP, Medicaid, Federal Public Housing Assistance, SSI, WIC, or Lifeline
- Participates in Tribal specific programs, such as Bureau of Indian Affairs General Assistance, Tribal TANF, or Food Distribution Program on Indian Reservations
- Is approved to receive benefits under the free and reduced-price school lunch program or the school breakfast program, including through the USDA Community Eligibility Provision in the 2019-2020, 2020-2021, or 2021-2022 school year
- Received a Federal Pell Grant during the current award year
- Meets the eligibility criteria for a participating provider's existing low-income program

Find out if you qualify and how to participate. Visit: fcc.gov/ACP

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Illinois		
Broadband Provider Name	Cricket wireless	Hello Mobile Telecom
4 SIWI Fiber	Crossville Communications	Henry County Telephone
Access Wireless	CTI Fiber	Home Telephone Co.
AirVoice Wireless	Culture Wireless	Hughes Network Systems
AirCell	DNA Communications	human-I-T
Adams Telephone Co-Operative	Dailytel	i3 Broadband
American Broadband and Telecommunications Company	Earthlink	Illinois Electric Cooperative
Aristotle Unified Communications	ECOMOBILE	Infiniti Mobile
Assurance Wireless	Egyptian Telephone Cooperative Association	Insight Mobile, Inc.
AT&T	enTouch Wireless	Jo-Carroll Energy
BLIP Networks	Excess Telecom	K20 Wireless
Bolton	Fidelity Communications	Kraus Electric Systems
Boost	Flat Rock Telephone Cooperative	KWSP Inter
Boo Wireless	Foundation for California Community Colleges	Life Wireless
Cherryville Telephone Company	Future Communications	Lingo
CairoNet	Go Technology Management	LTE Wireless
CassComm	Grafton Telephone Company	McDonough
	Gridley Telephone Co.	Madison Telephone Company
	GTI	Maxsip Telecom
		Mediacom

Sample Set of Illinois Vendors for Affordable Connectivity Program A-M


<https://www.fcc.gov/affordable-connectivity-program-providers#illinois>

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A poll

If a family member or friend wanted to reach you, which of these methods of communication would likely get you to respond first?

- Call me on my office or home phone.
- Leave a voice message on my office or my home phone.
- Call my cell phone.
- Text me on my cell phone.
- Leave a voice message on my cell phone.
- Send me an email.
- Send me a message via facebook, Instagram or snapchat.
- Other ???



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One Size Does Not Fit All

- Telephone
- Mobile devices
- Videoconferencing
- Email
- Chat
- Text
- Social media



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What is accessible to our participants? Need a technological assessment as part of initial assessment.



Do you have internet/wifi at home:

- Yes
- No

Do you have a mobile phone?

- Yes
- No

Do you have a computer at home, a tablet or other device?

- Yes
- No

Do you have an email address that you use regularly?

- Yes
- No

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What are the usage patterns of our participants?



If someone needed to reach you quickly, what is the best way to reach you?

- Send me an email
- Text me on my cell phone
- Call me on my cell
- Call me on my home phone
- Other: _____

How often do you check your email?

- Several times a day
- Once daily
- Weekly
- Rarely
- I don't have an email account.

How often do you check your text messages?

- Several times a day
- Once daily
- Weekly
- Rarely
- I don't have text messaging.

How often do you check for telephone messages?

- If I get an alert, I will check.
- My phone doesn't have a notification system, so I rarely know when I have a message.
- I almost never listen to messages. No one I know leaves me messages.

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What are the usage patterns of our participants?



Check all that apply to you:

- I have a smart phone with unlimited talk and text.
- I have a smart phone that has limits on talk and text.
- I have a mobile phone but it isn't smart.
- I have a prepaid phone that has unlimited talk and text.
- I have a prepaid phone that has limits on talk and text.
- I don't have a mobile phone.

Check all that apply to you:

I use my mobile phone to:

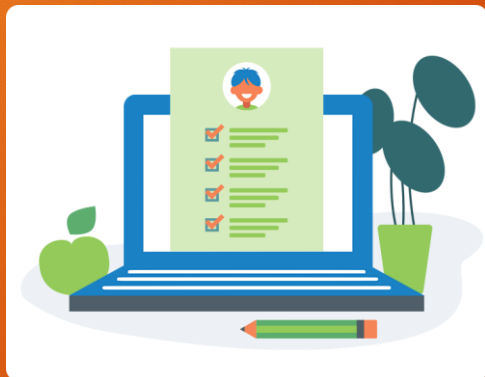
- Make and receive phone calls
- Send and receive text messages
- Read my email
- Browse the internet
- Use apps that are on the phone
- Use GPS on my phone to find addresses
- Search for information on the internet

In the past year, how many times have you changed your cell phone number?

- None
- 1 time
- 2 times
- 3 times
- More than 3 times

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How Comfortable/Familiar are the Participants with Technology?



Do you have any previous experience with online learning?

- Yes
- No

How comfortable are you with using the internet?

- Very comfortable
- Somewhat comfortable
- Uncomfortable

T F I use video chat to stay in touch with family and friends.

T F I enjoy learning how to use new kinds of technology.

T F Learning how to use technology will help me in my future job.

T F I use an online calendar to remember important dates and meetings that I have scheduled.

T F I would need help learning how to use a computer or phone to access internet.

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Adjustments to Strong Fathers, Stronger Families Program

Intake and Enrollment

Programs developed different options for completing enrollment process that better meets participant's needs: Phone, online, limited in person, electronic signatures.

Because of benefits and limitations to virtual enrollment, they found hybrid approach gave flexibility for a specific given situation.

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Adjustments to Strong Fathers, Stronger Families Program		
Intake and Enrollment	Workshops and Training	
<p>Programs developed different options for completing enrollment process that better meets participant's needs: Phone, online, limited in person, electronic signatures.</p> <p>Because of benefits and limitations to virtual enrollment, they found hybrid approach gave flexibility for a specific given situation.</p>	<p>Program had to transition the workshops to a virtual environment and present on web-conferencing platforms.</p> <p>Had to select more online trainings packages.</p> <p>Had to adjust the schedules—online all day exceeded what fathers could absorb.</p>	<p>Research this option for recording and sharing recorded virtual presentations: ispringcloud.com</p>

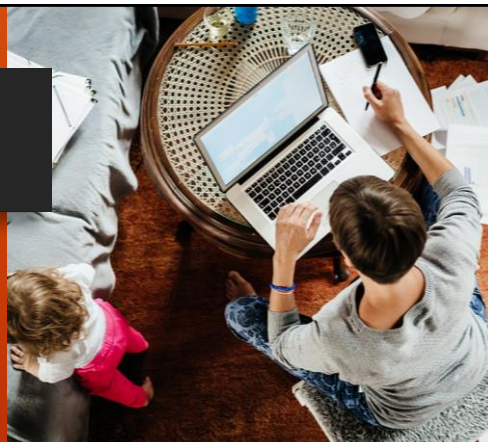
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Adjustments to Strong Fathers, Stronger Families Program		
Intake and Enrollment	Workshops and Training	Case Management and Referrals
<p>Programs developed different options for completing enrollment process that better meets participant's needs: Phone, online, limited in person, electronic signatures.</p> <p>Because of benefits and limitations to virtual enrollment, they found hybrid approach gave flexibility for a specific given situation.</p>	<p>Program had to transition the workshops to a virtual environment and present on web-conferencing platforms.</p> <p>Had to select more online trainings packages.</p> <p>Had to adjust the schedules—online all day exceeded what fathers could absorb.</p>	<p>Pre-covid, different staff had different functions (case manager, recruiter, data specialist, job developer, case manager). Staff had to cross-train to learn and deliver other functions.</p> <p>During the pandemic, needs increase (food, childcare, housing, employment) so an increase in referrals was needed.</p> <p>Virtual meetings had to have increased value to the fathers. Pre-pandemic, they gave incentives for attending case management meetings. Post-pandemic those incentives weren't immediate so were less useful to drive participation.</p>

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Lessons Learned: Challenges

- No quiet place in the home to engage in virtual sessions.
- Confidentiality.
- Not being able to “see” body language.
- Participants may have limited technology.
- Skills to use the technology aren’t necessarily present so training is involved.
- Translating a “human touch” over technology is a learning curve.
- Building rapport is more difficult.
- School closure and child-care issues meant in-home disruptions.
- Classes were too long. Fathers could not participate in a training that was 8 hours long x 4 days a week - so they had to adjust the model.



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Technology may be unfamiliar to participants

- 📍 Focus initial remote sessions on learning how to use the technology.
- 👥 Start sessions by acknowledging the challenges of meeting in this new format
- 📞 Determine a back-up communication method (such as phone calls) if technology fails.
- 🗣️ Reassess communication methods after two or three sessions.

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Back-Up Plan: Other types of Remote Services


- Paper packets
- Workbooks
 - US Mail
 - Pick up Area
 - No contact delivery
- Pre-recorded courses
- Telephone services like tutoring



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Develop a “Web-side” Manner: Environment

- Create a quiet environment with a simple backdrop
- Use headphones for privacy
- Use video equipment that allows for eye contact
- Reduce Distractions and Adjust Lighting
- Dress to Impress
- Body Language and Eye Contact Matter



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Develop a “Web-side” Manner: Beginning of the Call

- Virtual introduction is your first impression
 - Confirm your name, your role
 - Don’t “get right down to business”
 - Pause to invoke social pleasantries (replicating an in-person visit)
 - Try to ascertain if anyone is within hearing distance on their end
 - Ask if there is anything they want to make sure gets discussed during the call.
 - Go over the agenda for the call



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Two Sample Agendas



Uninspired Meeting Agenda (Transactional)

- Update of what they have done since the last meeting.
- Come up with some new activities/assignments, etc.
- Get some documents from you including time sheets.
- Issue supportive services.
- Set up next meeting.



Engaging Meeting Agenda (Relationship Building)

- Find out if you are free to talk (confidentiality)
- Find out how things are going in general.
- Talk about their goals.
- Find out how they are feeling about your progress (on whatever activity they are doing).
- Talk about any successes that they have had and any concerns that may have come up.
- Set a plan for what they want to do next.
- Find out what help that the need.
- Talk about documents that I may need.
- Summarize what we have talked about/agreed to.
- Answer any questions they might have.
- Set up next meeting.

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Develop a “Web-side” Manner: Middle

Use motivational interviewing skills:

- Ask open ended questions
- Use affirmations
- Use reflective listening: repeat back what you think you heard
- Ask permission before giving advice



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Compare these two questions

• What is the highest grade that you completed?



• Talk to me about your schooling and education from high school to present.

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Develop a “Web-side” manner: End of the Case Management Session

- Leave time for questions
- Once call is winding down, summarize the plan
- Agree on the next steps
- Provide instructions regarding any after-visit paperwork that may need to be submitted
- Send email to document the results.



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Confidentiality and Safeguards

- Assess the privacy on both sides.
- Discuss situation within the home.
- Verify person’s identity before discussing personal information.
- Ask if anyone else is within hearing distance on their end.
- HIPAA Compliant:
 - WebEx
 - Zoom
 - Doxy
 - TheraNest

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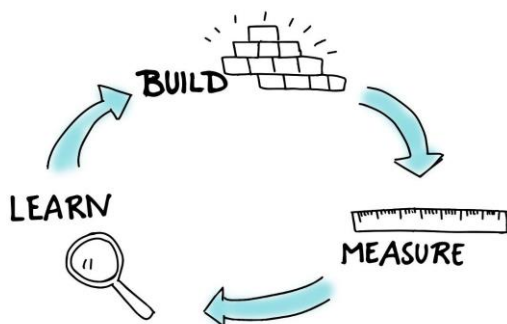
When Should I Use Email, Video, Phone, Chat, Web Conferencing?

Evaluate the information that you need to communicate.

- What is the level of formality? Formal? Chatty?
- How soon do you need to communicate this information and how soon do you need an answer?
- How complex is the information?
- Will the person likely need to ask follow-up questions?
- How sensitive is the subject?
- What method did participant say works best for them?
- Synchronous or asynchronous?



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Adopt a “test and learn” mentality

Recognize when it isn't working and change it.

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What's next?



- Investment in IT.
- Shifting case management models to encompass virtual.
- Identifying what works and what doesn't work.
- More research and technical assistance in increasing engagement in virtual setting.
- Research participant perspectives.
- Figuring out the correct balance of hybrid services.

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Questions?



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