

NASW standardized case manager system specification

Purpose:

The City of San Antonio (City) intends to use the Case Management System to handle a wide variety of social services in a standardized way that would result in uniformity of operations and reporting at the business level. The purpose of this section is to layout the standardized workflow that has been formulated based on the standard set by the National Association of Social Workers (NASW). Even though each individual social service may have its own specialized terminology, steps, and outcome they should all map back through configuration to the standardized workflow as outlined below.

Standard Workflow:

Social work case management shall consist of the following six stages in the provision of direct services to clients and their families:



1. **Engagement** – Each individual would engage with the service needed by accessing and submitting a service program application which would determine eligibility of service. The service program engagement would provide individuals the following functionality:
 - a. Accessible program service application in preferred language of choice
 - b. Submit service application information
 - c. Verify eligibility according to program guidelines
 - d. Enroll client in program or make referrals to other program services
2. **Assessment** - Assess clients' needs by ongoing information-gathering and decision-making process to help clients identify their goals, strengths, and challenges. In this stage case manager would provide clients with the following functionality:
 - a. Perform a needs assessment to outline a client's situation and immediate and long-term needs
 - b. Identify services available to client bases on needs
3. **Service Plan**- A clients service plan would be developed which would be based on a meaningful assessment and would have specific, attainable, measurable objectives and the steps needed to attain those objectives. In the service plan stage the case manager would provide the client with the following functionality:
 - a. Plan of service by identifying the resources available to realize goals being set
 - b. Delineation of responsibilities of all involved (case manager, client and other involved parties/agencies)
 - c. A schedule for reassessing and modifying the client's initial goals
4. **Service Delivery** – Realization of service plan by recognizing the strengths and needs of client as service is being delivered. The service delivery would provide the following functionality:
 - a. Make internal service(s) accessible in an effective and timely manner
 - b. Provide external referral/wraparound services (advocacy on behalf of the client including creating, obtaining, or brokering needed client resources)
5. **Coordination and Monitoring** – Coordinate and monitor functions to enable the case manager and the client to determine whether services have been effective in helping achieve the client's goals. In this state the social worker would need the following function:

- a. Keep track of service delivery to evaluate implementation of service delivery to respond promptly to changes in client's needs to alter services accordingly
 - b. Provide for case manager to perform a reassessment of client's service status, changes in needs and priorities identified in the initial assessment to determine whether services are meeting client's goals
6. **Termination** – Completion of service would warrant the need to prepare client for the effects of termination. The service termination stage would provide the following functionality:
 - a. Set service and financial criteria for completing/discontinuing service
 - b. Prepare a termination/completion plan which would prepare clients, other members of the family system, and service providers for transitions when services are discontinued or transferred

Workflow and Data Integrity:

In order to ensure meaningful and relevant tracking as well as reporting, the City requires that the proposed system:

- ☐ Enforces workflow Integrity by ensuring that actions taken by users of the system (case managers and other staff) follow the configured order of operations for the specified service
- ☐ Enforces data integrity by having built-in data entry checks on ALL data manually entered by using relevant (to current state) drop downs, selection list, date-time checks, etc.

Standard Reporting:

The City requires standardized reporting at the state and sub-state levels illustrated in the "Standard Workflow" paragraph. Case reporting should allow users to specify date-time range criteria, boundary conditions, case type and attributes filters to extract the relevant case record. The case record should be presented as one flattened record with states and substates flattened in columns along with their respective date-time of completion.

Scalability/Adaptability:

The City requires that the selected vendor demonstrates their system ability to be adapted and scaled in terms of configuring new services as well as changing business rules on existing services by business City staff without the need for code changes and without impacting the integrity of the standard workflow as well as reporting.