



# INTEGRATED CASE PLANNING

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## One of the newest best practices, Integrated Case Planning, is a focus of current Operational Tuneups for drug courts

This material and sample form are proposed for the purpose of:

1. Helping your drug court implement this process
2. To improve outcomes for participants who have been screened for eligibility under the current court criteria and admitted to either the misdemeanor track of a court or a felony track.
3. To ensure team members are fully aware of and able to implement a comprehensive plan of services for each client that addresses the Montana profile of drug court client outcome variables.
4. To hold team members accountable for addressing the priority needs of clients.

A person wearing a white lab coat is shown from the chest down, pointing their right index finger towards a screen. The background is blurred, suggesting a clinical or office setting.

# Purpose of Presentation

## WHAT IS MEANT BY INTEGRATED CASE PLANNING?

Integrated case plans are structured, collaborative roadmaps that combine behavioral health, social service, and criminogenic risk data to guide client rehabilitation and supervision.

This presentation will offer a sample tool that can be used by courts to facilitate comprehensive, collaborative case planning that is integrated and ensures team members are all informed of the services planned for and the persons responsible for the identified needs of the client.





# HOW IS THIS DONE?

Why do we need it?

- In the absence of a CCPlan, essential needs of the client often fail to be addressed or slip through the cracks.
- The whole team should be involved in service planning to ensure comprehensive planning.
- Ensures all team members understand what needs to be done for the client and who will be responsible
- Regular updates ensure progress is routinely reviewed prior to phasing up or discharge

# HOW DO WE DO THIS AND WHY DO WE NEED IT?

- **Success = Writing it down and reviewing what is written at regular intervals.**



- In the absence of comprehensive case planning, clinical and recovery needs are likely to ‘slip through the cracks’ and/or fail to be addressed adequately.
- The team over-uses or has unrealistic expectations of the treatment provider.
- The team lacks vital information for the phasing up process and relies on compliance factors rather than quality factors as a basis of decision-making. E.g. drug testing results, attendance, etc.
- Example of a quality factor: The case plan specifies the client will be engaged in an employment or training plan by the second phase. [MT. Profile Data] If client is not, advancement to Phase 3 should not occur.

# TAKE AWAYS

**This presentation will offer a sample template that can be used by courts to facilitate comprehensive, collaborative case planning that is integrated and ensures team members are all informed of the services planned for and the persons responsible for the identified needs of the client.**

- ❖ **The template can be done on a fillable form. Google Forms is recommended and is free.**
- ❖ **Each contributor to the form receives a link from the Treatment Coordinator to the form.**

# Initial Steps in Implementation

- Agree on implementing Integrated Case Planning and commit to time frames for regular review/update of the plan at scheduled team meetings.
- Develop a Case Plan Template with essential information on it. The Montana Profile of Variables for Successful Outcomes is a good foundation for the content of the case plan.
- Ensure the template includes who will be responsible for following up on each element of the plan.
- Integrated Case Planning is a collaborative process involving the whole team and a consensus document in which members have agreed to the template content, review periods and agree to participate in the process.
- Engage a person [usually clerical] to develop the fillable form with the template.
- Select the Fillable Form vendor you will use and engage them
  - Follow their procedures for form development
- Determine the reporting person/individual on the team who will be responsible for each element of the form and assign them.

# Key Variables from the Montana Courts From the DIMS Data

| EMPLOYMENT<br>Status    | Successful | Unsuccessful |
|-------------------------|------------|--------------|
| MT. Fulltime            | 61%        | 29%          |
| Part time               | 19%        | 14%          |
| Unemployed              | 3%         | 44%          |
| NAT. Fulltime           | 64%        | 16%          |
| Part time -Nat          | 13%        | 10%          |
| Unemployed-<br>National | 4%         | 58%          |

# MONTANA PROFILE OF SUCCESSFUL VARIABLES, CONT'D

- **Employment** as shown in the previous table is a key variable that ranks as extremely important in successful outcomes. The data suggests that participants need to be gainfully employed early on or if not employed, involved in a training or education program beginning in phase two. Over 50% of unsuccessful discharges in the sample were unemployed. [ What about the disabled or those unable to work?]
- **Other Priority Variables:**
  - **A. The optimum length of stay is 16 months**
  - **B. Housing that is safe, drug free and affordable is another critical variable of successful outcomes with the need identified in phase 1 so planning can begin in this phase.**
  - **C. EDUCATION:** Those graduating without having obtained at least a GED are most at risk of an unsuccessful discharge.
  - **D. AGE;** The age span from 24-34 has the highest likelihood of **unsuccessful** discharges
- The final finding for courts is **to improve the ratio of incentives to sanctions** for the purpose of shaping behaviors. Particularly those that incentivize clients to seek education, employment, training and housing opportunities as well as maintenance of abstinence from mood altering substances. After all, it is positive reinforcement that is most effective in changing behavior not sanctions.

# THE INITIAL CASE PLAN FORMAT

## VETERANS TREATMENT COURT INTEGRATED INITIAL CASE PLAN

**Demographics: Veterans Name:**

\_\_\_\_\_ **Age:** \_\_\_\_\_

**Date of Plan:** \_\_\_\_\_

**Date of Admission:** \_\_\_\_\_ **Mentor Assigned:**

\_\_\_\_\_  
**Court Assigned: Misdemeanor\_\_ Felony\_\_**

**Initial Screening Data: Rant Risk:** \_\_\_\_\_ **IRONS: Anti-social** \_\_\_\_\_ **Psychopathy** \_\_\_\_\_

**Aces Score:\*** \_\_\_\_\_ **Significant traumas:**

**Needs further screening /Referral for:**

**Co-occurring Condition[s]:**

**Other Findings:**

**Person[s] Reporting:**

**Housing: \* Current living conditions**

**Goal for change:**

**Time Frame:**

**Person[s] Reporting**

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**Treatment: \*Drugs of Choice**

**Level of Care:** \_\_\_\_\_

**Problems to be addressed on Treatment Plan**

**Family Status: Use, Level of support, Needs, Other significant relationships**

**Employment\* Current status, working, # hours, where? Wages etc.  
Unemployed? Reason?**

**Vocational/Educational: Could training or education improve or enhance the client's future and likelihood of recovery? Does he/she have at least a GED? \_\_\_\_\_  
What type of training might be advantageous?**

**Is he/she under-employed? Would training or education improve options/possibilities?**

**Plan/Recommendation:**

**Person[s] Reporting:**

# VETERANS COURT FOLLOW UP INTEGRATED CASE PLAN

Demographics: Veterans Name: \_\_\_\_\_ Age: \_\_\_\_\_  
Date of Admission: \_\_\_\_\_ Mentor Assigned \_\_\_\_\_  
Court Assigned: Misdemeanor\_\_ Felony\_\_ Review Date: \_\_\_\_\_

Housing: \* Current Status list name/ address of new residence if applicable  
Plan Accomplished \_y\_\_\_\_n\_\_\_\_

Person[s] Reporting

## Status of Trauma Treatment or Referral:

Needs further screening /Referral for:

Co-occurring Condition[s]:y\_\_ n\_\_

Plan:

New Findings/treatment plan problems

Treatment plan Progress: [problems completed, new problems added,  
projected date of discharge]

**Employment/training/education**

**Initial Recommendation/plan**

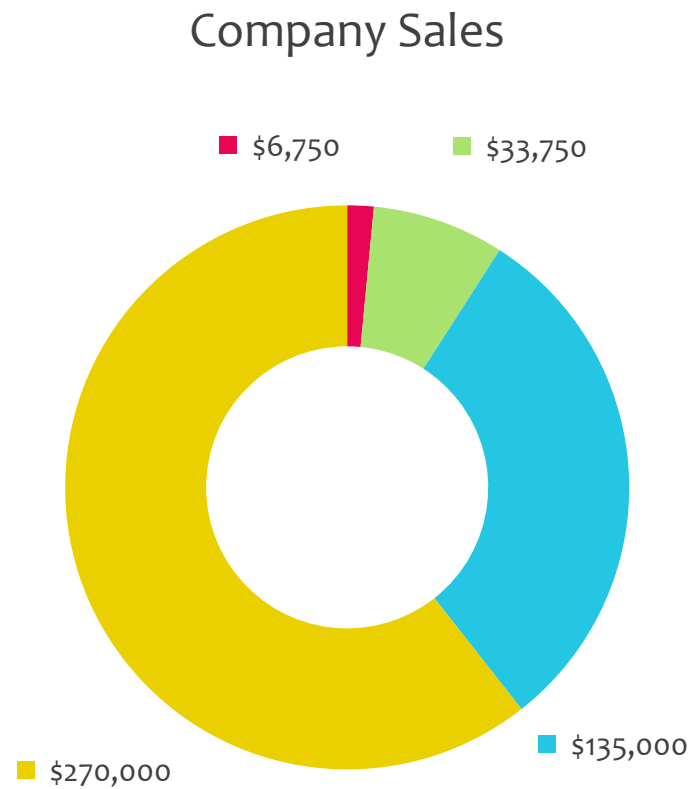
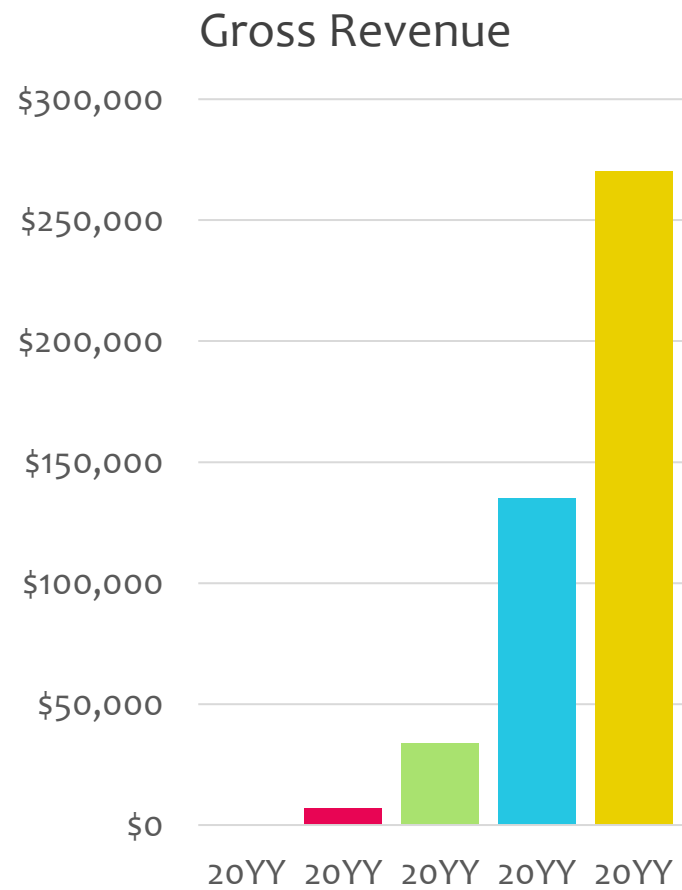
**Current Status of plan [list employment place, wages,  
address and hours**





# Chart Options

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# Table

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|      | Vendors | Users | Consultants | Ad Buyers | Gross Revenue | Company Revenue |
|------|---------|-------|-------------|-----------|---------------|-----------------|
| 20YY | 0       | 0     | 2           | 0         | \$0           | \$0             |
| 20YY | 10      | 100   | 50          | 10        | \$6,750       | \$1,013         |
| 20YY | 50      | 500   | 60          | 500       | \$33,750      | \$5,063         |
| 20YY | 200     | 2000  | 100         | 5000      | \$135,000     | \$20,250        |
| 20YY | 400     | 4000  | 120         | 50000     | \$270,000     | \$40,500        |



Full screen image with caption  
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# Thank You

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Customize this Template

# Template Editing Instructions and Feedback