GUIDELINES FOR PROVIDING CASE MANAGEMENT AND DISASTER CASE MANAGEMENT DURING THE COVID-19 PANDEMIC

Case Management activities, from the beginning of the intake process, through the end of case closures, has traditionally been a highly interpersonal process with many face to face interactions.

In light of the current COVID-19 pandemic, CCUSA has created some suggested case management-specific program modifications, based on the most current information from the Center for Disease Control (CDC) and best practices from the Catholic Charities network partners. These guidelines are designed to help keep your staff and clients stay safe, while still continuing to provide valuable case management services.

Included is a list of the following guidelines:

- Suggested General Guidelines for agencies to use to reduce the spread of the COVID-19 virus.
- Suggested Guidelines when meeting clients in person
- Suggested Guidelines for providing case management remotely
- Suggested Guidelines for agencies providing disaster case management
- Suggested Administrative Guidelines

GENERAL GUIDELINES FOR CONTINUED DAY TO DAY OPERATIONS

- Strongly encourage staff to work remotely.
- Provide clear, accurate, and up-to-date information to clients/staff on COVID-19 prevention and wellness. If possible, provide clients/staff with tools to assist them (hand sanitizer, masks, rubber gloves, etc.) in a manner that can be received or delivered that maintains 6 ft. distance between persons.
- Ensure information and materials provided to clients is clear, concise, and in multiple languages reflective of the population your agency serves.
- Make clients aware of any program changes. Have referral and resource access information readily available to share with clients. Contact common referral sources to identify what changes may have occurred in their service delivery process.
- Ensure other service providers and officials in the area are aware of any significant changes to your program operations.
- Cancel all in-person client meetings if at all possible. If determined necessary, consider having client complete screening form prior to any interaction.
- For staff that may continue to work in an office, increase physical distance of workspaces and consider staggering staff workdays to minimize the chance of spreading the virus.

- Limit contact with the most vulnerable population to COVID-19, such as older adults, people who have serious chronic medical conditions such as heart disease, diabetes, lung disease.
- Encourage vigilant and increased personal protective measures among staff (e.g., stay home when sick, frequent handwashing, utilizing disposable gloves, close breakrooms).
- Practice social distancing, a conscious effort to reduce close contact between people and hopefully stymie community transmission of the virus.
- Cancel non urgent/nonessential activities, such as community outreach, signing documents in-person, etc. to reduce the spread of COVID-19.

IN PERSON MEETINGS:

In an effort to reduce the spread of the COVID-19 virus, **it is best practice for case managers and other disaster case management staff (such as construction cost analysts) to avoid meeting clients in person**. If a face to face meeting is absolutely necessary, consider the following guidelines:

- Prior to meeting with the client, provide a screening document for the client to complete and sign which confirms that the client is currently not sick, nor does the client exhibit symptoms of the COVID-19 virus, confirms that they have not traveled to any of the banned countries in the last 30 days, they have not knowingly been in contact with anyone who has the virus, and they have not gathered in groups of 10 or more.
- Practice social distancing protocols
- Clean and disinfect frequently touched surfaces after every in-person interaction.
- Don't share pens/pencils – have clients bring and use their own pens or provide new pens/pencils for them to keep.
- Avoid meeting inside a client's home. Meet outside the home, and for as short of time as necessary.

REMOTE CASE MANAGEMENT:

With the help of technology, many case management activities can be accomplished remotely.

- *Face Time* (or other web based software) and phone conversations can be an effective way to interact with the client.
- Documents requiring signatures may need to either be sent via mail to the client, or consider DocuSign to e-sign and send documents.
- Encourage regularly scheduled team meetings to be held via online meeting platforms such as Zoom or Microsoft Teams.

- As case managers begin to work remotely, consider options for dealing with physical case files:
    - Have Supervisors present at the office (on a limited based) to help audit case files with DCMs who are working remote.
    - Implement a file checkout system which allows a DCM to pick up case files. A file checkout form should be utilized which tracks the custody of each case file (sample attached).
- Make time to connect with case management staff. Working remote can be isolating, so making time to check in with staff is vital to morale.

DISASTER CASE MANAGEMENT:

- *Face Time* (or other commonly available video enabled software) and phone conversations are an effective way to begin the intake process with the client. While the assessment is traditionally done at the client's property, *Face Time* conversations can be a helpful way to get a sense of the home's damage.
- Recovery Planning, monitoring and case closure can begin on the phone. Documents requiring signatures may need to either be sent via mail to the client, or signed and shared via photograph, or consider DocuSign to e-sign and send documents.
- Encourage Long-Term Recovery groups and unmet needs group to meet via online meeting platforms such as Zoom or Microsoft Teams.
- Increase physical space of staff at the job worksites; do not conduct major repairs or rebuilds with 10 or more persons (including clients, if present)
- Disinfect home repair/rebuild tools after use; always wear work gloves.
- Cancel non urgent/nonessential activities, such as community outreach, home blessings, signing documents in-person, etc. to reduce the spread of COVID-19
- Disaster SNAP (D-SNAP) is not currently available under this emergency declaration, however Congress has helped provide supplemental funding to SNAP and other programs. If your clients are experiencing food insecurity, consider the referral options in the "Food Insecurity" section further below.

ADMINISTRATIVE CONSIDERATIONS:

For staff working remotely and working with your IT and HR Departments, following are administrative items to consider:

- **Technology**
    - Staff should utilize agency-issued computers due to the firewalls and other security measures to ensure greater protection of emails/data. Encourage the use of a Virtual Private Network (VPN) and discourage the use of utilizing a public/shared network.
    - Ensure staff has adequate internet support to conduct business remotely.
    - If staff is using personal cellphones to conduct business, remind them to block outgoing calls, particularly to clients (Enter *67, then phone number).

- Remind staff to log off their computers at the end of the workday.
- If possible, ensure that sensitive client information is encrypted if being sent via email.
- Remind staff not to include client's name/initials when sending emails/texts, rather use agency generated identifier number.
- Be alert for phishing emails (be aware of emails with poor grammar and syntax, vague emails, recognizable email address but strange email title).
- Secure phones/tablets
  Whether staff is using personal or agency issued phones/tablets, the following steps are recommended to reduce the opportunities for hackers:
  - Switch off Bluetooth. Some hackers use malware to attack Bluetooth compatible devices, so turn off the function if it is not being used.
  - Disable push notifications. Some apps, such as health monitoring apps will share private data with push notifications.
  - Update ASAP. Even minor updates to operating systems and apps may contain vital security enhancements which deal with the latest malware and viruses.
  - Password protect devices. Pin numbers, touch IDs and two-factor authentication is recommended.

- **Communications**
  - Update agency website to include closures, change of hours, important updates, etc.
  - Ensure that staff checks office phone for messages, and updates outgoing office phone voicemail message.
  - An updated list of all employee's contact information should be readily available.
  - Keep 2-1-1 updated on agency closure or other important changes.
  - Communicate any agency/program changes with funders.

- **Client confidentiality**
  Similar to working at an office, client confidentiality must be guarded when working remote. Things to consider are:
  - Not discussing clients with other household members
  - Log off the computer at the end of each workday.
  - If possible, find a workspace at home which allows privacy.
  - Don't throw any paperwork in the trash which may include client information. Either shred those items, or collect and bring to the main office to shred when possible.
  - If physical case files are brought home, have locking/portable file cases available.

- **Physical case files:**
    - Have Supervisors present at the office (on a limited based) to help audit case files with case managers who are working remote.
    - Implement a file checkout system which allows a case manager to pick up case files. A file checkout form should be utilized which tracks the custody of each case file (sample attached).

- **Human Resources Polices/Procedures**
  If standard HR policies continue to apply to remote working staff, it is recommended that those policies be reinforced and emphasized, such as:
    - Social Media
    - Timesheets – is there a process for staff to sign/submit timesheets?
    - Sick Time/PTO/Health Issues
    - Staff Issues (grievances, performance reviews, benefits questions, etc.)

- **Managing Remote Staff**
    - Expectations – It is important to set and manage the expectations for staff working remotely, particular setting work schedules, dealing with children who are now home, technology issues, etc.
    - Time Management – adjusting to working from home may require some assistance with time management skills
    - Connecting with remote staff – working remote can be isolating so making time for daily/weekly check-ins is vital, whether it be via phone, or platforms such as Zoom and Microsoft Teams.

Potential Food Insecurity Referrals:

- Special Supplemental Nutrition Program for Women, Infants and Children (WIC) to have increased funding for women or mothers with young children who lose their jobs or are laid off during the COVID-19 emergency
- Emergency Food Assistance Program (TEFAP) has increased funding to assist local food banks to meet the increased demand of low-income Americans during this difficult time.
- Emergency SNAP assistance may be available in your state for children who otherwise would have received free or reduced-price meals.
- Disaster SNAP (D-SNAP) is not available under this emergency declaration, however Congress has helped provide supplemental funding to SNAP and other programs. If your clients are experiencing food insecurity, consider the following referral options:

Catholic Charities USA

USDA is providing nutrition assistance grants to Puerto Rico, American Samoa, and the Commonwealth of the Northern Mariana Islands specific to COVID-19, agencies in those Territories should inquire with