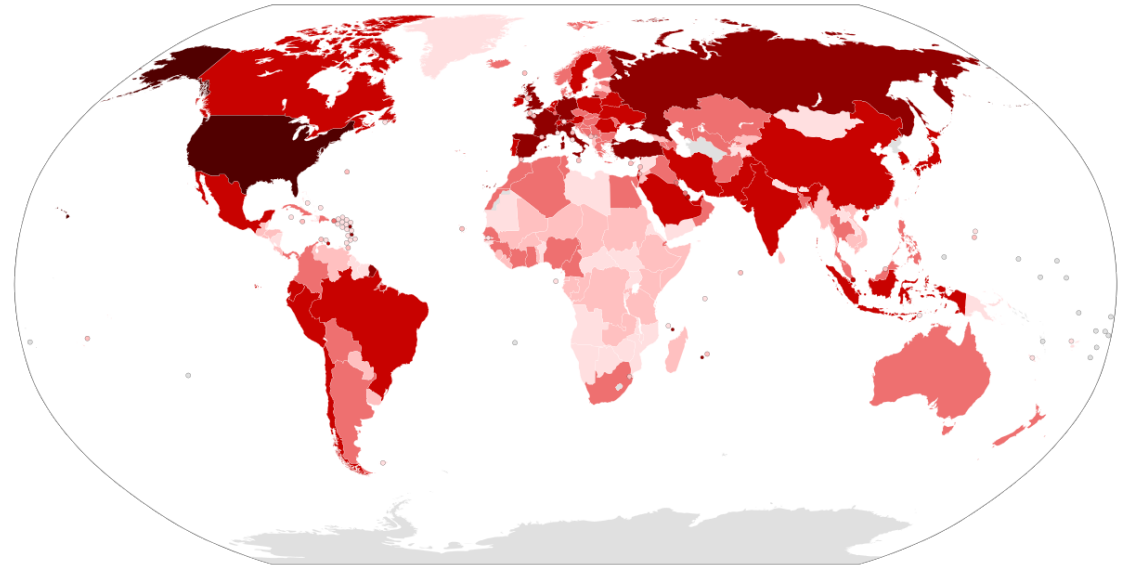
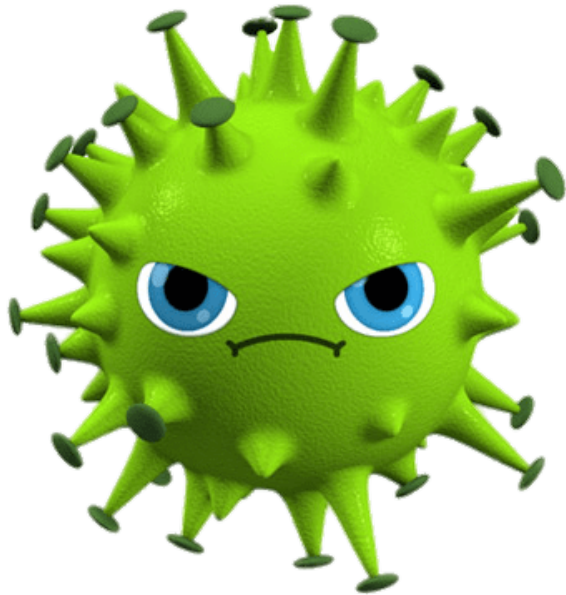


Remote VR Counseling Service Provision

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Learning Objectives

- At the end of this webinar, attendees will understand:
 - remote service delivery
 - expectations and processes
 - communication
 - setting up your work area
 - developing a plan
 - referrals / outreach
 - gathering / analyzing
 - documenting / tracking
 - reporting
 - security



**CHANGE
AHEAD**

Remote Service Delivery

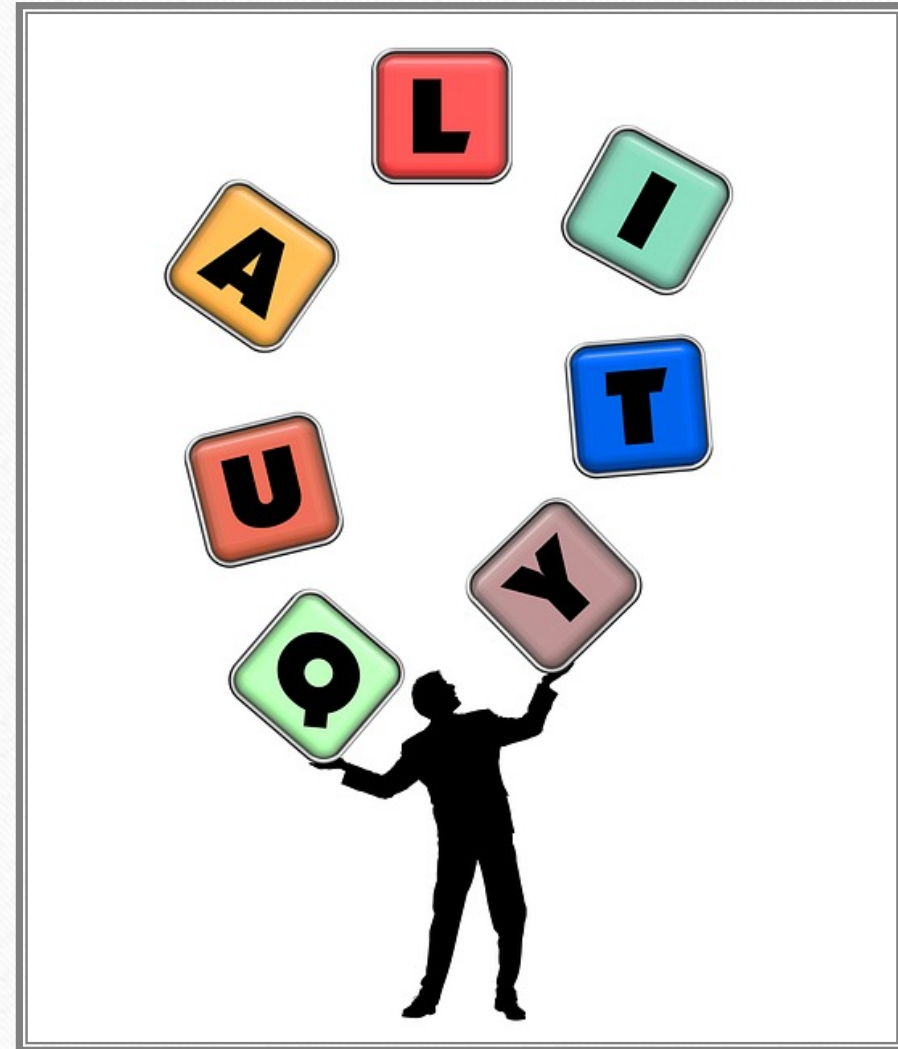
- Remote service delivery is
 - not for the faint of heart;
 - a new mind-set; and
 - a new way of service delivery
- It's a whole new way to think about your position





There Are a Million More Distractions Working From Home!

- Family and friends often think you have **FREE** time when you work from home. Set boundaries.
- **Juggling:**
 - Work
 - Homeschooling/Young Children
 - Laundry, groceries, dinner, dishes, etc.
 - Self care





Understanding Expectations

- **SUPER IMPORTANT**

- Clarify expectations and the virtual processes with your supervisor
 - Parameters
 - Work schedule
 - Technology
 - Timelines
 - Tracking
 - Meetings
 - Documentation/Reporting
 - Quality
 - Security





Be Organized – Keep Focused

- Make sure you have what you need to be successful
 - Technology and Online capabilities
 - Access to files/documents
 - Calendar/Post-its/To-do list
- Prioritize/Triage
- Self-Discipline
- Mentor/Buddy





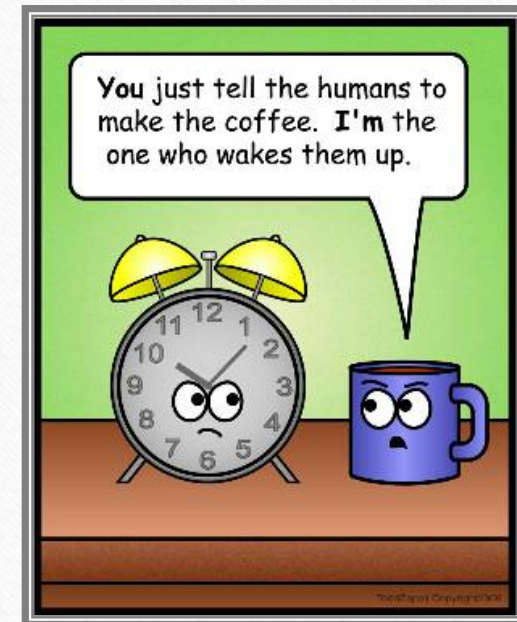
Seasoned or Brand New - This is Tougher Than It Looks!

- Be kind to yourself if
 - your mind cannot focus
 - you are not productive
 - your child needs you
- The key is **NOT** to stay there
 - Walk away for a few minutes (go for a walk, shower, give the kids some attention)
 - Call someone to help you refocus – support is important



Before You Start Your Work Day

- Develop a routine
 - Avoid or plan for distractions
 - Keep your schedule and to-do list up to date
 - Triage your day
 - Brace for “intrusions”
- Self-care
 - Shower, exercise, coffee, dress

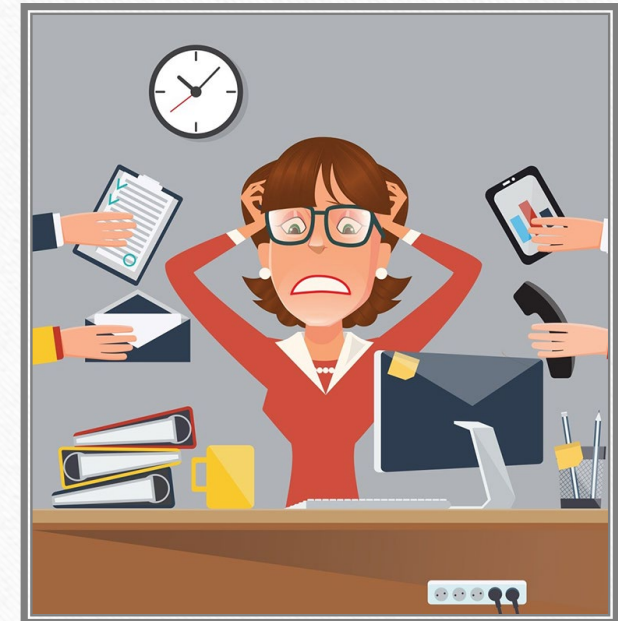


GOOD
MORNING.....



During Work Hours

- Stay focused
- Keep your desk organized and simple
- Manage your time
 - set small goals each day
- Reward your successes
- Virtual calls/trainings are hard to stay focused
 - take notes and contribute ideas or information
- Reach out when the isolation hits
- **Work hard, Work smart Do not over do**





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Before You End Your Work Day

- Update your tracking
- Update your to-do list
- Clean and organize your desk
- Secure PII
- Check emails
- Celebrate your successes

THE WORKING WEEK



DON'T SPEAK TO ME!



GOD, GET ME THROUGH THIS DAY!



LIFE SLOWLY SEEPS BACK INTO MY BODY...



ANTICIPATION!



Remote Job Duties

- Now that you are no longer in your “real” office
 - Think about all of the different tasks that you are responsible for
 - Consider each step in those tasks
 - Do you have the tools you need?
 - Do you have a safe place to protect the PII?
 - What additional training or support do you need, if any?
- Let's take a look at a few....



Remote Caseload



- Identify strategies for services you would normally complete face-to-face
 - Phone
 - Most commonly used tool - many run out of minutes
 - Email
 - Security around sending PII
 - FAX
 - Most do not have
 - United State Postal Services
 - Send self-addressed stamped envelopes
 - Flag page(s) where signatures/other information is required
 - ZOOM, Go-to-Meeting, and other similar sites
 - Many may not have internet access, technology or understand

Current Caseload

- Develop a plan
 - Status of case files/caseloads
 - Status of current services
 - What is still pending (assessment, reports, invoices, referrals, etc.)?
 - When is it due?
 - Who do I contact?
 - Update calendar and to-do list



Receiving New Referrals

What is your virtual plan?



- Think through your delivery and what you need:
 - Start Intake / Assessments
 - Demographics
 - Referral forms
 - Service Authorizations
 - Consents (3288 and organization)
 - Invoices
 - Best time and way to reach referral
 - What else did I miss?????

Activating New Referrals



- What is your virtual plan to gather and track needed information
 - Referrals (new, in process and completed)
 - Outreach (dates and purpose)
 - Continue to complete intake/assessments
 - Answer questions (so that the participant understands)
 - Identify needed services
 - Make sure the referral has your contact information
 - Set follow up call - put it on your calendar – remind participant
 - Make and track referrals to vendors
 - Complete case notes
 - What else did I miss?????

Activating New Referrals (con.)

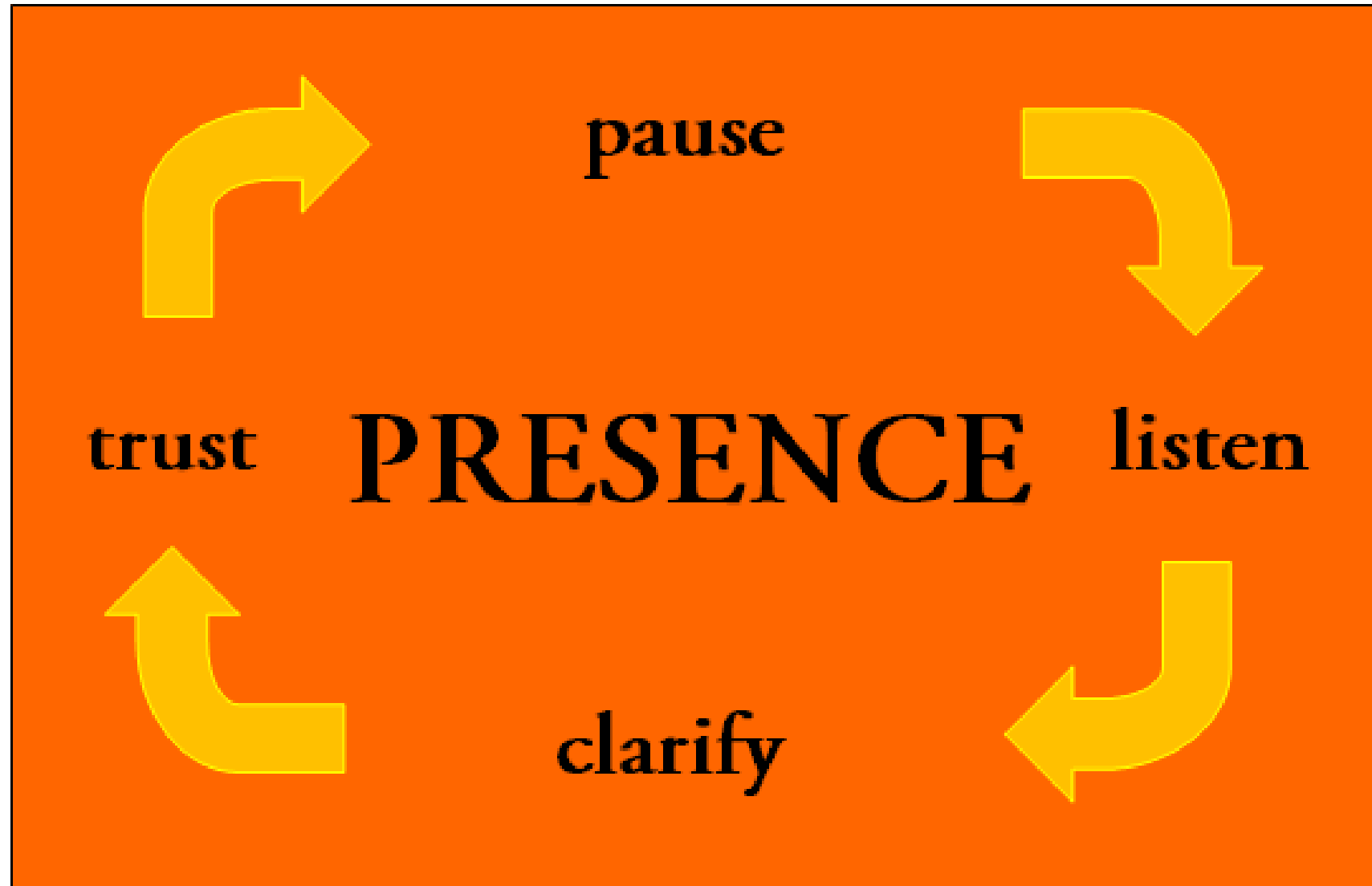
- **Issues with initial and ongoing communication**
 - Understanding who you are and what you want
 - “Cold calls” often go unanswered
 - send a **short and clear** letter in advance with
 - your name, agency, date and time you will reach out to start their intake
 - ask if they need any phone accommodations and
 - phone number for them to reach you
 - Address language barriers
 - Family, friend, Language Line
 - Determine if the referral understands what you are sharing
 - Repeat back
 - Send information with simple, clear instructions or notes
 - Understanding the importance of returning items
 - Self-addressed, stamped envelope
 - Date to SEND back



Breathe and Reach Out

- **EXCELLENT COMMUNICATION SKILLS IS THE KEY:**
 - Set up a quiet and calm background
 - Contact the referral on the day and time identified
 - If no answer, leave clear message with name and contact number
 - Warm and welcoming voice
 - Avoid leaving Personal Identifying Information (PII)
 - Track time to recontact - document attempt
 - Introduce yourself and the purpose of the call
 - Be friendly, caring and helpful – they cannot see your face !
 - Check on their well-being (COVID) – explain you are working from home
 - Start intake or set a date and time to complete it
 - Ask pressing questions if the intake is not completed





Gathering

Build Trust – “Walk Your Talk”

- This will be your most frustrating task
- Things move slower when you are remote
- Documents are not returned timely or not returned
- You have to be super clear about what you are explaining or needing
 - Help them locate phone number or websites to secure documents you need
 - Have them recap what they need to do, when it is due, and when the next call is
 - Send a postcard or short reminder about the next call and what items need to be gathered





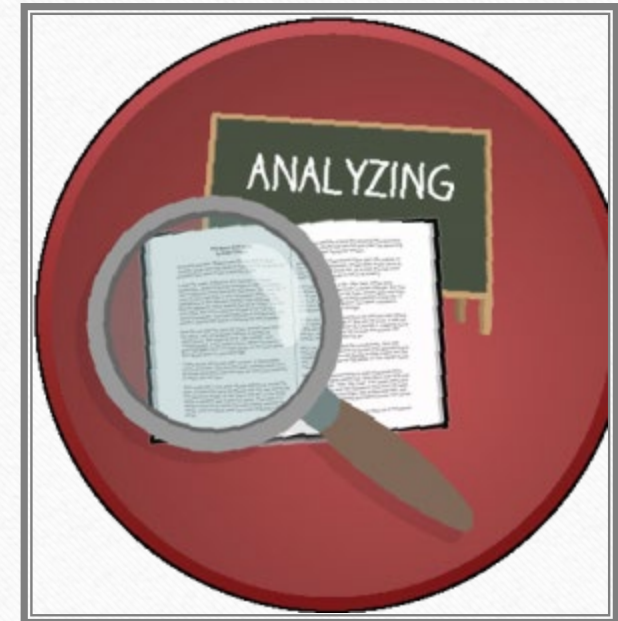
Track Gathering

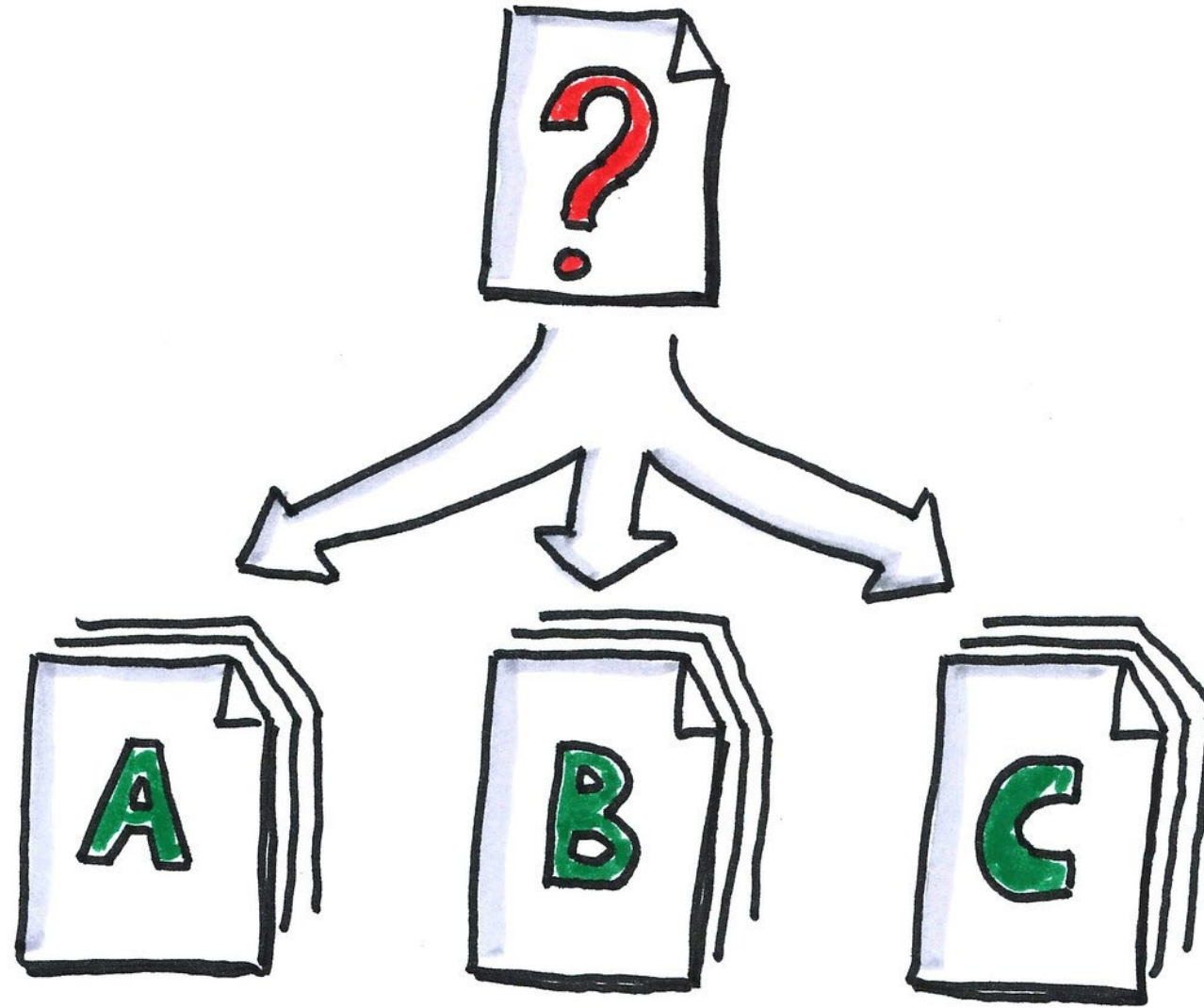
- Complete the intake
- Complete all assessments
- Secure additional documentation (explain why it is needed)
 - Pay Stubs
 - Housing/SNAP
 - Cash benefits
 - Insurance
- Confirm services requested
- Secure BPQY, if necessary
- Ensure all required consents are signed
- Set time to secure any other requested documents and process to receive them

Analyzing

This will feel like nothing is new!

- Put all the pieces together
- Clarify what is still missing and how to get it
- Review goal / look at and document different options to share on next call
- Prepare to explain:
 - current situation
 - next steps
 - impact of next steps
 - participant's role (reporting)
 - counselor's role
- Make and track referrals, as needed
- Create the service plan





Documentation

- Document details of the calls, intake, assessments, etc.
- Write thorough case notes that include best way to contact/communicate with participant
- You may not have met this person – make notes on individual nuances to help you remember
- Ensure participant reports are clear and complete
 - Written in a manner **THAT** participant can understand
 - Include supporting documents, calculation sheets, etc.
- Send, track and receive invoices and all required documents
- Use peer or supervisor review and guidance, as needed







Ongoing Support

- CRITICAL – especially for new referrals that has never met you:
 - Be responsive
 - Stay in touch
 - Be friendly
 - Be thorough, but may need to be given in smaller pieces of information
 - Stay current on their personal status
 - Stay current on current services and next steps
 - Be available – “walk the talk”

SUPPORT

The word "SUPPORT" is rendered in large, 3D block letters. Each letter is held by a small, white, 3D humanoid figure. The letters are colored in a rainbow gradient: 'S' is red, 'U' is orange, 'P' is yellow, 'P' is light green, 'O' is green, 'R' is dark green, and 'T' is blue. The figures are standing on a white surface, and their shadows are cast onto the surface below them.



Tracking

- Track
 - all referrals
 - contact made/attempted
 - status of
 - intake
 - service delivery / awaiting documents
 - outcomes
 - invoice / payment
- Case notes
- Meetings/Calls
- Due dates of reports

What's
next



Reporting

- Monthly/Quarterly/Annual Reports
- Caseload documentation
- Correspondence
- Be more than number
- Share your remote strategies
- Share success stories
- **Show your supervisor that you've got this!**





Quality Services

- Develop trust – without trust, not much will happen
- Stay in touch
- Gather, verify and analyze information – some cases may happen slower (that is ok)
- Refer to appropriate vendors and monitor status
- Keep documentation and tracking up to date
- Reach out more
- **REMEMBER**: You may be the only support a participant has



S E R V I C E
Q U A L I T Y
S A T I S F A C T I O N
L O Y A L T Y
S U P P O R T
C O M M U N I C A T I O N
F E E D B A C K
T R U S T



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Remote Security

- Protect each participant's Personal Identifying Information (PII)
 - Paper case file double locked
 - Online files saved to encrypted location
 - All email correspondence must be encrypted
 - Do not share PII with anyone, unless
 - they have a need to know and
 - participant has given their written consent



Phew!!

You Have A Lot of Important Responsibilities

- I went over your various responsibilities so that you can
 - Think through each step from the perspective of it being a virtual service;
 - determine if you have the tools, training and technology you need to be successful;
 - be patient and move at the pace each participant can handle;
 - can see how important it is to be organized and focused; and
 - see what a critical and important role you play in the life of every person on your caseload.
- I am sure I missed a ton of your responsibilities, but YOU know themand you know that you've got this!



WOW!



CONFIDENCE LEVEL



In Closing

- Embrace this new adventure
- Ask for additional training, tools, or guidance
- Be present
- Be patient
- Set daily goals for yourself
- Stay focused
- Stay organized
- Be kind to yourself and others
- You've got this!



**Thank You – It
has been an
honor!**

