Morning Session:

Welcome: Marlin Hollis, Training Coordinator CHTC

Introduction: Lisa Jones RN and Missy Harrison RN

1. DHS > Division of Family and Community Services > Office of Family Wellness > Bureau of Maternal and Child Health > [Regional Map](file:///C:/Users/ljones/AppData/Local/Packages/microsoft.windowscommunicationsapps_8wekyb3d8bbwe/LocalState/Files/S0/4/Attachments/Regional%20Map%2012%203%2021%5b1933%5d.pdf)
2. [BMCH Programs](https://www.dhs.state.il.us/page.aspx?item=32005): Goal Decrease Maternal and Infant Mortality and Morbidity
   1. Statutes [(JCAR/MCH code](https://www.ilga.gov/commission/jcar/admincode/077/07700630sections.html), [ILCS FCM Act](https://www.ilga.gov/legislation/ilcs/ilcs3.asp?ActID=2724), [APORS](https://www.ilga.gov/commission/jcar/admincode/077/077008400C02100R.html))
   2. [Funding](https://budget.illinois.gov/) – State GRF (Infant Mortality)
   3. Where can you find the things that you need to know to do your job???
   4. Special Projects – Funds go to more than just the 3 main/ongoing programs
   5. Case Management Programs
      1. [Family Case Management](https://www.dhs.state.il.us/page.aspx?item=143419)
      2. [High Risk Infant Follow Up](https://www.dhs.state.il.us/page.aspx?item=143420)
      3. [Better Birth Outcomes](https://www.dhs.state.il.us/page.aspx?item=143421)

Grants and Contracts

1. [Grant Opportunities](https://www.dhs.state.il.us/page.aspx?item=85526)
   1. How to prepare in advance
      1. Learn about GATA and [Pre-qualification steps](https://www.dhs.state.il.us/page.aspx?item=138635)
      2. Know your community!
      3. Follow guidance and application requirements as outlined in each specific NOFO
      4. Check often for NOFO opportunities, [sign up for the listserv!](https://gata.illinois.gov/grants/csfa.html)
   2. Notice of Funding Opportunity (NOFO) Can be extended up to 3 fiscal years, can be NOFO’d at any time
      1. Initial vs Renewal Application
   3. Funding Determination – allocated by caseload to ensure equitable distribution of funds, but reimbursed monthly for expenses on their approved budget

Planning your program budget

* + 1. Consult [2CFR200](https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200) as well as guidance from BMCH Policy manual on allowable expenses
    2. Work closely with your agency’s fiscal team
    3. Leverage existing resources internally and in community (both paid and free)
    4. Different systems: CSA, CRV, GATA portal
    5. Budget approval steps and signoff
  1. Budget revisions
  2. Re-assess your program budget quarterly
     1. Why & when to revise (Amend before you spend!)
     2. How to request revision

Contract Agreement

* 1. Published in CSA after approval, not finalized until fully executed (signed and counter-signed by administrator) Request a copy form your specific contract from your agency administrator
  2. Exhibits (description of A to F)
     1. FY Exhibits B, E, F (Performance and Clinical compliance)
     2. Exhibit C (Fiscal compliance)
     3. Exhibit G (special conditions and risk assessment corrective action steps)
  3. System Support defined in the contract (relationship with resources in the community and internal resources within the agency)
  4. Define levels of program integration for support service programs
  5. Care Coordination
  6. Racial Equity Lens

1. Internal Clinical and Performance Monitoring
   1. Local Agency Policy and Procedure Manual
      1. Internal Policies of Agency
         1. Standing Order/Protocols & handling abnormal assessments
         2. Approved methods of communication with client (phone, text, social media)
         3. Time & attendance tracking per program HSPR0723
         4. Client Referral and/or Transfer Policy
      2. Updating Policies
      3. Define Quality Assurance
      4. Identify guidelines, frequency, implementation, & monitoring QA

QA Tools (FCM, HRIF, BBO)

* + - 1. Importance of QA Tools
      2. Clinical Review Tool
      3. Chart Audit Tool
      4. Observation of your CM staff providing services (remote, on-stie, and home visit)
      5. Process for the Program Review
         1. Frequency
         2. Components
         3. Timeline
         4. How to prepare
         5. Post-Review steps
         6. Common review findings
    1. Performance Data
    2. Staffing
    3. Staffing Qualifications for each program role
    4. Training required for CM (CS Security, Implicit Bias – annual; iCAN – 3 months after hire)
    5. Other agency-required training for MCH and professional development
       1. Customer Service
       2. Communication & Motivational Interviewing
       3. Clinical Competencies and Skills
    6. Agency evaluations/performance review schedule
    7. Inform DHS ASAP with staffing changes, staff on extended leave of absence, staffing shortages/vacancies, or in case of extended clinic closures

Leadership

* + - 1. Ways to attract and retain valuable employees
      2. How do you build a team……
      3. What kind of leader are you?
      4. 5 Types of Leadership Styles

a. Laissez-Faire

* 1. Autocratic
  2. Participative
  3. Transactional
  4. Transformational

1. Build Trust
2. Smart Goals
3. 10 Best Goals for Managers
4. Communication
5. Ways to retain valuable employees

Problem Solving and Decision Making

* 1. Please Pass the Problem
  2. Ways to recognize staff for achieving goal
  3. How to develop improvement plan if staff not meeting goals

1. Ways to provide In-Service training for program updates or staff development
2. Time Management for yourself and your team– wearing many hats, balancing multiple programs
3. Managing staff during pandemic and maintaining staff morale
4. Managing remote or hybrid staff
5. Crucial Conversations – delivering effective feedback and difficult conversations with staff
6. How to lead effective 1:1 staff check-in
7. How to lead effective staff meetings
8. Coordination and Collaboration with other agencies

18Caseload Management

* 1. Assigned Caseload
  2. Achieved Caseload – HSPR1734
     1. 1st Friday of the month in DHS CS Reports
     2. The week after will be shared to agencies
     3. Monitoring caseload
     4. Managing low caseload
     5. Managing high caseload
     6. Option to request DHS to suspend program due to extenuating/uncontrollable circumstances about caseload – decision should not be taken lightly but may be only option

Outreach

* 1. Define outreach
  2. Identify outreach methods
  3. Identify marketing strategies for agency
  4. Develop outreach plan
  5. Name ways to improve outreach
  6. When to re-assess outreach plan
  7. When to submit plan to RN Consultant
  8. How to budget for outreach, what is allowable?

Fiscal Monitoring & Tips for Budget Items

* 1. Types of Fiscal reviews
  2. Define Fiscal Audit
  3. Allowable Cost
  4. Unallowable Cost
  5. Monthly Invoices or Expenditure Documentation Form
  6. Periodic Fiscal Reporting (PFR) – Quarterly, Tips for budget items
  7. Grant Exclusive Line Item
     1. Outreach
     2. Transportation
     3. Emergency Supplies or Milestones
     4. Supplemental Documentation
     5. Distribution Process
     6. Working with your Fiscal team on supplemental documentation
  8. Reimbursement/Payment timelines
  9. Different DHS staff roles: Clinical Program staff (RNC), Administrative Program Staff, Support staff, CSSC, Fiscal Staff, OCA
  10. Inventory Management (how to manage and how to dispose of grant purchased items)
  11. Scavenger Hunt

Cornerstone Administrative Course

* 1. How to add new employee AD30
  2. Security Coordinator Training AD32
  3. Employee Information Screen AD15 (Used to establish a cornerstone ID)
  4. How to change CM rights in CS
  5. Security Screen- Used to assign screen access to employees AD16
  6. Caseload Reassignment AD17
  7. Things to consider when assigning a case manager
  8. Adding a provider
  9. Security Requirements
     1. Annual training AD32
     2. Updating CM list in CS
     3. Submitting the updated list to DHS annually
  10. HSPRO747: Participant Risk Report
  11. HSPR0705: The Participant’s with Expected Delivery Date this Month
  12. HSPR0707: Infants who will turn 1 year old this Month
  13. HSPRO604: AD HOC Mailing Register Report
  14. HSPR0724: Case Findings
  15. SC05 & SC06: Staff Scheduling
  16. AD10 Beginning of Day (BOD) & AD11 End of Day (EOD)
  17. Auto Termination 70 and 16 descriptions

DHS Website Navigation for Resources

[DHS Family Case Management Programs](https://www.dhs.state.il.us/page.aspx?item=29734)

Springfield Urban League Navigation of Website for Resources and Training schedule

[Community Health Training Center](https://www.springfieldul.org/chtc)