1. **COURSE TITLE\*: Case Management and Writing in the Helping Professions**
2. **CATALOG – PREFIX/COURSE NUMBER/COURSE SECTION\*:** HSSR 1150
3. **PREREQUISITE(S)\*: ENGL 1101 COREQUISITE(S)\*: None**
4. **COURSE TIME/LOCATION/MODALITY: (*Course Syllabus – Individual Instructor Specific*)**
5. **CREDIT HOURS\*: 3 LECTURE HOURS\*: 3**

 **LABORATORY HOURS\*: 0 (contact hours) OBSERVATION HOURS: 0**

1. **FACULTY CONTACT INFORMATION: *(Course Syllabus – Individual Instructor Specific)***
2. **COURSE DESCRIPTION\*:**

An intensive writing course focusing on the various forms of professional writing typically encountered in the helping professions and on the use of behavioral observations and writing to document client interactions and behaviors. Students will learn beginning skills needed to maintain records and case management necessary for rendering professional services to clients. Students will learn to analyze professional writing situations and apply the principles of effective writing to documentation, measurable goals and objectives, grant/proposal writing, letters, memos, case management, and treatment planning in generalist practice and chemical dependency. Topics will include case assignment, planning, assessment, goal setting, observation, documentation, intervention, evaluation, and referral.

This course provides some of the required hours for application for a Preliminary CDCA, the renewable CDCA, and LCDC II, as listed by the Ohio Chemical Dependency Professionals Board.

1. **LEARNING OUTCOMES\*:**

Coursework will be designed to instruct students in the following:

1. Reasons for documentation of client and worker behavior.

2. Characteristics and contents of good records (i.e., content that is relevant, accurate, and complete).

3. Role of the writer and purpose of the document (i.e., instruct, interpret, document, recommend, propose).

4. Using behavioral writing principles and grammar and punctuation in professional writing.

5. Professional documentation skills, grant writing, measurable goals and objectives, and other forms of workplace writing.

6. Using technology in work-related writing for research.

7. Explain the role of a case manager in the field of human services, including settings within which treatment planning takes place.

8. Cite, describe, and demonstrate the rules of ethical conduct as they apply to case management and treatment planning.

9. Participate actively and appropriately as the client in the case management process role-playing sessions in the laboratory setting.

10. Explain each stage of the case management process, including specific skills, treatment planning, appropriate methods, and record keeping associated with each stage.

**9. ADOPTED TEXT(S)\*:**

*Record Keeping in Psychotherapy and Counseling*

By: Ellen T. Luepker

 3rd edition, 2022, Taylor & Francis Publishing

 ISBN: 978-0-367-7-1251-8 (textbook one)

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*Generalist Case Management, (LL)(w/MindTap Counseling, Access Card)
Edition: 5th
ISBN: 9781337537070 )textbook two)
Author: Woodside
Publisher: Brooks Cole*

Students are encouraged to acquire their Cengage textbooks through the [SSCC Bookstores](https://www.sscc.edu/services/bookstore.shtml#textbooks) or directly from [Cengage](https://www.cengage.com/unlimited/). Cengage Unlimited allows a student to receive access to Cengage's entire textbook catalog, and all digital resources, for a flat fee.

What does this mean to you? First, students can get ALL Cengage textbooks for one price.

Free print rental is available with any activated Cengage Unlimited digital course for only $7.99 shipping and handling per hardcopy textbook (this price is based on the average MSRP of Cengage hardcopy textbooks)

Also, students are given the option to purchase a loose-leaf copy to keep after they activate their digital course for anywhere between $20-and $50 (price dependent on title).

If you purchased Cengage Unlimited last semester with either the 1- or 2-year option, there is no additional cost for this course.

**Important things to know about what you need to buy to pass this course:**

MindTap is required to do your reading, homework, and quizzes; and therefore required to pass this course. However, MindTap contains an ebook, so you have a less expensive option to buy.

**10. OTHER REQUIRED MATERIALS\*\*: (SEE APPENDIX C FOR TECHNOLOGY REQUEST FORM.)\*\***

Southern State Community College offers technical support for students. Please see the following information about technology requirements and how to access assistance. Please note that your Instructor does not have access to the systems that support email, MyCanvas, and other publisher platforms for online learning. Therefore, you need to utilize the information below to resolve any technical issues related to your education at SSCC.

[Click Here for Student Technology Resources](https://www.sscc.edu/academics/student-technology-resources.shtml)

**11. GRADING SCALE\*\*\*:**

##  The grading scale will follow the policy in the college catalog:

##  A 100 – 90

B 89 – 80

C 79 – 70

D 69 – 60

F 59 – 0

**12. GRADING PROCEDURES OR ASSESSMENTS:**

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| --- | --- | --- |
| **MindTap- Overall grade** | **1 @ 100 pts each** | **100** |
| **Resource Book** | **1 @ 150 pts each** | **150** |
| **Service Learning/Group Project** | **1 @ 100 pts each** | **100** |
| **Letter to a Judge** | **1 @ 100 pts each** | **100** |
| **SOAP Notes** | **4 @ 100 pts each** | **400** |
| **Paper - Biography** | **1 @ 100 pts each** | **100** |
| **Paper – Video and case management needs** | **1 @ 100** | **100** |
| **Discussions** | **10 @ 15 points each** | **150** |
| **Attendance** | **1 @ 100** | **100** |
| **Total** |  | **1300** |

* 1. **MindTap –** All students in the course must complete assignments in MindTap via Cengage for one of the textbooks. The overall grade in the publisher content will count toward the grade in the course.
	2. **Resource Book -**

Resource Notebook/Binder is to be developed by each student with information regarding every service available in your county of residence or the county of your employment. This resource book will be alphabetized and organized so that the CM will easily be able to give info to clients. This will contain pamphlets, phone numbers, addresses, and key contacts for a client to access the external resources in their county. The development of this resource book is foundational for managing cases well. Please take this very seriously. YOU WILL USE this in your first job!!! This project will be graded using the following criteria:

1. Quantity: How much information has been gathered?

2. Quality: Neatness and Consistent Format

3. Organization: Alphabetized and Cross-Referenced

4. Practical: Students will be given five different case scenarios by the professor. They will demonstrate the book's usability and their knowledge base of Case Management Theory.

* 1. **Letter to a Judge –** You will be given a scenario; based on the scenario, and you will write a letter to a Judge. Grammar is essential here! Content will also be graded.
	2. **SOAP Notes –** You will be given four scenarios and must write soap notes on each one. The scenario you receive will depend on your area of interest. Scenarios may be in written form or in the form of a video you must watch and write the notes. These will be graded on the form – did you follow SOAP, the content of what you included under each, and your ability to determine the next steps with the client.
	3. **Service Learning Group Project** – This will be discussed in class and decided on by the class. More details will be included once we decide on the project. A rubric for grading will be developed once the class chooses the actual project.
	4. **Biography Paper** - You are to write a one-page biography.
	5. Paper – assessment of case management needs of an individual and their family. The video will be watched in class. You will need to take notes—a minimum of 4 pages, 12-point font, Times New Roman, and double-spaced. You must have a cover sheet. Do not write in the first person. Think of it as a report for a referral source. We will review this more in class.
	6. **Discussion boards** are collaborative learning experiences. Therefore, the student must create a thread in response to the provided prompt for each forum. When responding to Discussion Board Forums, answers each of the questions posted for the assigned readings or videos. Your answers must be thorough, coherent, and demonstrate critical thinking to earn all points. In addition, you must give feedback to at least one additional student on the discussion thread. Each thread must be a minimum of 200 words and demonstrate course-related knowledge. You must check Canvas weekly to ensure you complete all discussion board forums on time.
	7. Attendance

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| --- |
| **Attendance** |
| No Absences | 100 |
| One absence | 90 |
| Two absences | 80 |
| 3 absences  | 70 |
| Four absences | 60 |
| Miss 4 or more classes | 0 and at risk of receiving an F if you fail to withdraw |

**13. COURSE METHODOLOGY: *(Course Syllabus – Individual Instructor Specific)***

This course will utilize lectures, case studies, class discussions, small group projects, and group discussions. This course will also use power points to supplement the material in the textbook. Videos (i.e., movies, Tedtalks, music, or otherwise) may be used in addition to the textbook and power points for the class to supplement the primary textbook. Interactive class discussion is encouraged, and staying current on reading assignments is necessary to participate in class discussions adequately. These may be viewed in class or assigned throughout the semester to view and be prepared to discuss in class. The Instructor may post links to videos in the learning management system, MyCanvas. In addition, the Instructor may require the students to write a reflective paper on any video, music, or otherwise, shown in class or directed to be viewed outside of class hours.

The course is sensitive. Various topics, including trauma, are personal and relevant to all individuals. The Instructor will advise students on self-care during the class. Confidentiality is expected, and if it is not respected, students may be dropped from the course.

Attendance:

One of the greater expectations of this course is fulfilling your obligation of attendance. While your readings cover a substantial proportion of the course content, classroom participation is the most integral part of this course. As attendance will be taken every day and is part of your overall grade, you must minimize the number of absences you may have. You will start with a 100-point attendance pool. For each absence, you will lose points from the attendance pool. For example, the student would need to withdraw from the course with seven absences. If you do not withdraw from the course, you will receive an "F" as your final grade. It is your responsibility to sign the attendance sheet as it is passed. If you request the Instructor add your name to the attendance sheet after class because you missed it as when passed around, you will be counted as tardy. See more information below on tardiness. If you are absent a day, you must ask the Instructor the next class day if you missed a handout, as these may contain information that can be included on quizzes and exams.

Tardiness:

Tardiness is a significant issue as well. It deprives you of needed classroom participation time; it is incredibly disruptive to the overall classroom flow and dynamic. Occasional lateness is understandable; consistent tardiness is not. For every three occurrences of tardiness, you will be given an absence. Treat this course as a serious learning endeavor and come to class on time. Tardiness will be defined as being late for the scheduled start of the class. For example, if the class begins at 3:00 pm and you arrive at 3:01 pm, you will be considered tardy. If the Instructor is late due to unforeseen events and you arrive later than the scheduled class, you will not be counted as tardy before the Instructor.

Cell Phones:

There is no reason for cell phones in class. Therefore, there is a simple rule: NO CELL PHONES ARE ALLOWED IN CLASS. Put them away from your visibility. The only exception is if you have an occupation that requires you to be on call. If that is the case, you must inform me for consent to have a cell phone.

Despite the attempted subterfuge, it is easy to spot when someone is texting. Don't have your cellphone out. If you have a cell phone out, an absence may be recorded.

Children in Class: Please do not bring children into Human Services classes, regardless of the reason. Many of the discussions held in Human Services classes feature mature topics and may not be suitable for children. Additionally, some students may feel uncomfortable engaging in class discussions on mature topics when children are in the room. So, please do not bring children to class.

Sleeping:

Sleep at home, not here. If you sleep, you are not present. If you are caught sleeping, you will be marked as being absent.

Disruptive Behavior:

Any behavior that distracts other students from learning and participating is disruptive. The disruptive behavior most commonly occurs in holding loud conversations during class (but not limited to such). If you are disruptive, you may be asked to leave the class and an absence recorded.

Academic Honesty:

Academic honesty is a must in an institution of higher learning. Academic dishonesty includes (but is not limited to) cheating, plagiarism, or helping another student engage in academic dishonesty. If a student engages in academic dishonesty, the student may receive an automatic failing grade for the assignment or course at the Instructor's discretion.

Reading:

Students are expected to complete the assigned reading before class to be prepared for class. Likewise, your writing assignments and exams will cover a significant portion of the assigned readings. In the tentative outline, you will see when readings are due. Looking at the chart, you will see a corresponding day with each textbook chapter. If there are additional readings, the Instructor may include these within the syllabus, post an announcement in MyCanvas, or have the reading title available on a specific assignment in the learning management system. If reading is posted in MyCanvas, you will need to locate the electronic version of the article (typically a journal article) if a PDF is not posted. The necessary information about the article – author, name of the journal, date, page numbers, etc. will be noted in the MyCanvas system. It is your responsibility to read all assigned items beyond the required textbook for the course.

**14. COURSE OUTLINE: *This outline must be followed per the endorsement of the HSSR 435 A Program.***

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| **HSSR 1150 Case Management and Writing in the Helping Professions OCDP Board Content Hours** |
| **Week** | **Lecture and Class Discussion** | **Assessment/Assignment****and Reading Due** | **Student Learning Outcome** | **OCDP Required Education Hours** |
| One | Review of Syllabus – student learning outcomesEthical Principles guiding client records – what is in them and how to protect them.Purpose of clinical recordsThe Golden ThreadInformed consent – what is it, and why is it important? | Luepker: Introduction, Chapter One, and Chapter TwoWrite a one-page autobiography | 1 - 10 | **C9 – 3 hours** |
| Two | Characteristics and contents of good recordkeeping – what is required in a client's record?Why are writing skills important?Confidentiality in an electronic age – current laws and consequences for breaches. What constitutes a breach? | Luepker: Chapter Three and Chapter FourWriting Assignment: Business Letter – referring a client to another organization | 1, 2, 3, 4, 5, 8 | **C9 – 3 hours** |
| Three | Exceptions to confidentiality – safety is the goal for all parties involved. Review of historical cases that set precedence. Accounting of disclosures log and the role they play in an organization.SMART goals and objectives in treatment planning – what are they, and who establishes these?SOAP Notes – how these can reduce liability and demonstrate the quality of care if called into court –example from the medical field | Luepker: Chapter Five and Chapter SixWriting Assignment: Goals and Objectives Based on case studyWriting Assignment: Case Note in SOAP format based on case study  | 2, 4, 5 | **C8 – 2 hours****C9 – 1 hour** |
| Four | Boundaries in an electronic age and the role of ethicsRetaining and destroying the records of inactive clients – Do not abandon your clients; No show letters; referrals to other places when they are ready for treatment in the future.Documenting unplanned discharges and reports to the court | Luepker: Chapter Seven and Chapter Eight Writing Assignment: Letter to client Writing Assignment: Complete a discharge summary  | 4, 5, 6, 7, 8 | **C8 – 2 hour****C9 – 1 hours** |
| Five | Using the client record as a therapeutic tool – i.e., progress reports to referral sources, treatment plans, level of care form, transition plansClinical Supervision Records – ethical guidelines and state requirementsIF IT IS NOT WRITTEN DOWN, IT DID NOT HAPPEN. | Luepker: Chapter Nine and Chapter Ten  | 5, 8 | **C8 – 2 hours****C9 – 1 hour** |
| Six | What do you do if you have to go to court? Types of releases of information Court ordersInterruptions in treatment and case closure – plan for these from the beginningDocumentation and types of case closures | Luepker: Chapter Eleven, Chapter Twelve, and Chapter 13 | 2, 3, 4  | **C8 – 2 hour****C9 – 1 hour** |
| Seven | Exam over the first bookRelationships and the role of case management How the addictive process impacts relationshipsCodependency with the family versus the case manager and professional responsibilitiesSocial, emotional, and human growth and development within the context of relationships | Submit Group Project |  | **C5 – 3 hours** |
| Eight | Definition of case management and the historyThe process of Case ManagementStages of Change and Stages of Treatment as they relate to case management services and developing a treatment plan | Woodside/McClam: Chapter One and Chapter Two | 7, 8, 9, 10 | **C2 – 2 hours****C8 – 1 hour** |
| Nine | Methods of delivering case management services – CM treatment planningRoles within Case ManagementLegal and Ethical IssuesFamily and confidentialityThe role of autonomyHow to make ethical decisions | Woodside/McClam: Chapter Three and Chapter Four | 7, 9, 10 | **C8 – 2 hour****C9 – 1 hour** |
| Ten | Working with Diverse Populations – social and cultural context concerning the manifestation of mental illness and addictionAssessment and the interview process to eligibility for services based on criteria and documentation of treatment planning | Woodside/McClam: Chapter Five and Chapter Six  | 3, 8, 10 | **C1 – 1 hour****C4 – 1 hour****C8 – 1 hour** |
| Eleven | Effective Interviewing Skills – attending behaviors, questioning, appropriate responses, working with court-ordered clients who may be resistant, i.e., the addicted population  | Exam Woodside/McClam: Seven Advocating with a purpose | 7, 9, 10 | **C2 – 2 hours****C4 – 1 hour** |
| Twelve | Service delivery planning – Assess for these: Strengths, Needs, Abilities, and PreferencesPlan development with input from the client and referral to appropriate ancillary services – who is responsible for whatDocumentation of these in the client record | Woodside/McClam: Chapter Eight and Chapter Nine | 7, 8, 10 | **C4 - 1 hour****C8 - 2 hours** |
| Thirteen | Coordinating services, referral, advocacy based on an assessment to include collateral data and placed on the treatment planQuality Improvement within organizationsProfessional growth and development as a case manager | Woodside/McClam: Chapter Ten, Chapter Eleven, and Twelve | 7, 8, 10 | **C4 – 1 hour****C2 – 2 hours** |
| Fourteen | Comprehensive CM in the CD populationTIP 27 SAMHSA [www.samhsa.gov](http://www.samhsa.gov)Continuum of care based on the client's needs – documentation in the clinical record.Lack of access to treatment and available resources | Woodside/McClam: Chapter Thirteen | 7, 8, 10 | **C4 – 1 hour****C8 – 2 hours** |
| Fifteen | Disengagement: Providing closure for the client and the CMUnderstanding boundaries and their importanceBoundary issues: Why I might not want to let go of a clientEthical Principles and Standards governing boundaries |  | 7, 8, 10 | **C9 – 3 hours** |
| Sixteen | Final Exam | Resource Book Project Presentation |  |  |

**15. SPECIFIC MANAGEMENT REQUIREMENTS\*\*\***

**Communication Policy**

MyCanvas is the primary communication tool in this course. Students must check the course site for announcements and monitor their email in MyCanvas regularly. In addition, emails to the Instructor must be sent from the email system in MyCanvas. The email in MyCanvas is the most efficient means to contact the Instructor for this course. Canvas has an application for iPhone and Android systems, enabling communication to be more efficient for students and instructors.

***Failure to read course announcements, instructor emails, or the course assignment schedule does not justify late assignments or failure to comprehend due dates.***

All assignment submissions are via MyCanvas. Written assignments must be submitted using the MyCanvas course assignment links. The assignments include submitting your papers or answers using a survey or test instrument. Other written assignments may be submitted in any of the following formats: Microsoft Word (.doc) preferred; Rich text format (.rtf); Plain text (.txt); Adobe Acrobat PDF (.pdf). All written assignments must be one document that is one attachment, not multiple attachments. Multiple attachments submitted for one written assignment will not be accepted and will result in a zero for the assignment even if submitted before the due date.

**ACADEMIC MISCONDUCT (Student Handbook, Page 38)**

[Click Here for a Link to Student Handbook](http://www.sscc.edu/students/assets/student-handbook.pdf)

**Southern State is committed to providing educational opportunities that promote students' academic, professional, and personal growth.  To these ends, all members of the College are expected to uphold the highest academic and ethical standards.**

Types of Misconduct are

1. Any unauthorized use of material (books, notes of any kind, and so forth) during an

examination, test, or quiz.

2. Copying from another student's work or permitting one's work to be copied during

an examination, test, or quiz.

3. Unauthorized use of equipment (computers, calculators, or any type of educational or laboratory equipment).

4. Permitting a person to pose in one's place during an examination, test, or quiz or

posing as another person during an examination, test, or quiz.

5. Altering an examination, test, or quiz, or any other type of evaluated work in an effort to have the work re‐evaluated for a higher grade.

6. Plagiarizing or permitting one's work to be plagiarized.

7. Using unauthorized or improper methods to determine in advance the contents of an examination, test, or quiz.

8. Unauthorized use of computer software during an examination, test, or quiz.

9. Submitting as one's own work a work of art, speech or oral report, a musical composition, a computer program, a laboratory project, or any other creation done by another person.

For further definition, student responsibilities, charges, sanctions, and the appeal process, visit:

[Click here for a Link to Academic Misconduct and Regulations](http://www.sscc.edu/academics/regulations.shtml#academic‐misconduct)

**Further clarification on plagiarism**

Understanding plagiarism can be confusing. Violations of these standards include cheating, plagiarizing; submitting, without permission, a paper or assignment completed for one class to fulfill a requirement for another class; fabricating materials, using materials in an unauthorized manner; misrepresenting academic records; or facilitating academic dishonesty.

To clarify, copying word for word from any source without enclosing the material in quotation

marks and citing the source and page number of the quote is considered plagiarism. Re-writing original ideas in your own words without citing the source of the ideas is also considered plagiarism. **You can again not turn in previous assignments for other courses to meet the requirements for this course. If you do, you will receive a zero (0) on the assignment and risk the possibility of failing the course automatically.**

**16. FERPA:\***

Students need to understand that others may see their work. For example, others may see your work when being distributed, during group project work, or if it is chosen for demonstration purposes.

Students also need to know that there is a strong possibility that their work may be submitted to other entities for plagiarism checks.

**17. ACCOMMODATIONS: \***

Students requesting accommodations may contact Ryan Hall, Accessibility Coordinator at rhall21@sscc.edu or 937-393-3431, X 2604.

Students seeking a religious accommodation for absences permitted under Ohio’s Testing Your Faith Act must provide the instructor and the Academic Affairs office with written notice of the specific dates for which the student requires an accommodation and must do so no later than fourteen (14) days after the first day of instruction or fourteen (14) days before the dates of absence, whichever comes first. For more information about Religious Accommodations, contact Ryan Hall, Accessibility Coordinator at rhall21@sscc.edu or 937-393-3431 X 2604.

**18. OTHER INFORMATION: \*\*\***

*The Instructor reserves the right to modify the course syllabus and content to enhance the learning of individual students and the class as a whole. Modifications may include additional assignments that are not listed in the syllabus but are conducive to learning and in the best interest of developing professional skills.*

**SYLLABUS TEMPLATE KEY**

**\*** Item cannot be altered from that which is included in the master syllabus approved by the Curriculum Committee.

**\*\*** Any alteration or addition must be approved by the Curriculum Committee

**\*\*\*** Item should begin with language as approved in the master syllabus but may be added to at the discretion of the faculty member.