

Section # 4652 Mondays 3 -6 PM, Room: 1275 Barnett Hall

*"Yesterday is history. Tomorrow is a mystery. Today is a gift. That's why it is called the present."* - Morse Earle

**Instructor:** Kasia Fortunati  
**Office:** CalWORKs Department, Bertolini Student Center, 3<sup>rd</sup> Floor  
**Email:** [kfortunati@santarosa.edu](mailto:kfortunati@santarosa.edu)

**Office Hours: Monday**  
**2:30 – 3PM & 5:30-6PM**  
**Phone:** (707) 521-7838

## **COURSE INFORMATION**

---

**Course Description:** This course explores the different phases and components of case management as a model of service delivery and includes experiential skill development relevant to the practice of case management in the human services field. This course includes the following topics: introduction to case management; administrative functions of case management; assessment, planning, and implementation phases of case management; organizational structure of human service agencies; case closures; and ethical and legal issues related to case management.

### **Student Learning Outcomes:**

1. Conduct an intake assessment and write an intake summary.
2. Develop a Service Plan that identifies appropriate referrals and incorporates the principles of case management.
3. Record proper documentation on a case including writing case notes, maintaining a calendar, writing progress reports on schedule and completing forms.
4. Conduct a closing session with a client and write a closing report.
5. Demonstrate appropriate counseling techniques.

## **COURSE REQUIREMENTS AND EXPECTATIONS**

---

### **Textbook and Materials (required):**

- Generalist Case Management, A Method of Human Services Delivery, 4<sup>th</sup> Edition, by Woodside & McClam.  
ISBN# 9781285173221

There is a copy of the textbook on reserve in Doyle Library available for use in the library for up to two hours. Use the library call number HV43 .W643 2013 to check out the textbook or CD/Fortunati to check out the audio version from the Reserves Desk.

### **Attendance and Participation:**

Consistent attendance and active class participation is essential. Attendance will be taken at the beginning of each class. If you are late to class, it is your responsibility to inform the instructor by the end of the class that you were present so you will not be marked absent. Material from class will assist you in completing course assignments and in taking exams.

- Develop a network of classmates to share notes and handouts with you in case you are absent.
- It is your responsibility to withdraw or drop from a class if you choose to stop attending during the semester.
- However, per District policy, I **may** drop a student for missing 10% of the total class hours, which is 2 class sessions.
- Being late to class or leaving early 3 times will count as 1 absence. Missing 3 class sessions will result in loss of all participation points.
- Class meetings that involve meetings with Client #1 or Client #2 are mandatory. Missing these class sessions may result in your being dropped from the course

### **Class Format:**

The learning environment is practical and experiential; Instruction will include:

- Lecture, writing assignments, report writing, and plan development
- Case studies and exercises; including small and large group work and role-play
- Related readings and class discussion
- Films and guest speakers

Section # 4652 Mondays 3 -6 PM, Room: 1275 Barnett Hall

**Assignments:** Due dates are provided on the **Course Topics & Outline**. I may not give reminders.

- It is your responsibility to complete all assignments by the due date.
- In-class tasks will be part of completing multiple assignments.
- It is your responsibility to monitor your grades throughout the semester.

**Late submissions:**

- All late assignments will receive a 20 percent deduction in points.
- Assignments will not be accepted more than one week past the due date.

**Student Confidentiality:** Any personal information shared or disclosed during class time must be kept confidential and cannot be discussed with anyone in or outside of class.

**Examinations:** There will be one quiz, a midterm, and a final exam for the course. Exams may consist of multiple choice questions, true/false, and/or short answers. There are no exam make-ups. If you are absent or late on exam dates you will lose the points.

**Communication by email:** I will respond to your email generally within 24 hours Monday through Thursday. All emails sent over the weekend will be answered on Monday or the first work day of the week.

- I will send out course announcements and links through the “**GU.Weblink**” in the Cubby portal. It is your responsibility to update your email address through your Cubby. DO NOT REPLY to this email address as I do not receive those replies. Emails must be sent to my email address at [kfortunati@santarosa.edu](mailto:kfortunati@santarosa.edu) for me to receive them.

**Email requirements:** Use the following steps when communicating with me via email:

- Type the course number in the **subject line** (“**COUN 93**”). Do not use symbols or the system will place it in junk mail.
- Include **your name (as it appears on the roster) in the text** of the email.
- If you are sending an attachment, **include some text in the email**. Title the attachment appropriately (“Homework #1”).
- Use an appropriate or professional email address. Any inappropriate or offensive emails will be blocked by me.

## METHOD OF EVALUATION

---

Grading in this class will be based on the following:

Information and Referral Research	10	<b>Grading:</b> <b>A = 323 - 360</b> <b>B = 287 - 322</b> <b>C = 251 - 286</b> <b>D = 215 - 250</b> <b>F = 214 or less</b>
Intakes & Plans (2 each; 20 points each)	80	
Progress reports (2 at 10 points each)	20	
Closing Report	20	
Homework (4 at 10 points each)	40	
Case notes	10	
Quiz (20 points) & Midterm (40 points)	60	
Final Exam	90	
Class Participation	30	

## STUDENT CONDUCT

---

**Behavior:** Students will conduct themselves in a manner that reflects an awareness of a common standard of decency, the rights of others, and respect for others.

All students are expected to know the Student Conduct Code and adhere to it in this class:

<https://student-conduct.santarosa.edu/discipline-due-process>

Section # 4652 Mondays 3 -6 PM, Room: 1275 Barnett Hall

- Arrive on time and be prepared to participate in a learning environment.
- If you must arrive late, take a seat near the door and do not walk in front of the speaker.
- Keep all cell phones and other electronic devices **on silent mode and out of sight**.
- In-class computer use is for note taking purposes only.
- You will be requested to leave the class session if you continue to use the electronics inappropriately, rudely, and/or disruptively in class.
- Violation of the Student Conduct Code may result in suspension from two (2) class meetings and a referral to Vice President of Student Services for discipline.

**Academic Integrity:** All written assignments will be your original written work; other sources used need to be cited properly.

- Plagiarism of any kind will result in a failing grade on that assignment.
- Students who plagiarize or cheat may be suspended (for one or two class meetings by the instructor) and referred to the Vice President of Student Services for discipline sanction, in cases of egregious violation. Please read the college policy/procedure on academic integrity at:  
<http://www.boarddocs.com/ca/santarosa/Board.nsf/goto?open&id=A63TJQ77A2C8>

## AVAILABLE RESOURCES

---

### Academic resources:

- This course requires you to have a college-level comprehension, reading, and writing ability. If you are unable to perform at this level, please meet with me or seek assistance from any of the available resources (Writing Centers, Tutorial Centers, or Labs) on campus.

### Disability resources:

- If you need disability related accommodations for this class, such as a note taker, test-taking services, special furniture, etc., please provide the Authorization for Academic Accommodations (AAA letter) from the Disability Resources Department (DRD) to me as soon as possible.
- You may also speak with me privately about your accommodations. If you have not received authorization from DRD, it is recommended that you contact them directly. DRD is located in the Bertolini Student Services Building (527-4278).
- If you are not authorized for accommodations and select a desk provided by DRD, you may be asked to vacate the seat.

### Health services:

- The discussions in class may bring up unresolved issues or open "old wounds" for some people. Contact Crisis Counseling in the Student Health Services (527-4445 in Santa Rosa, or 778-3919 in Petaluma) or me to receive support.

## LAST NOTES

---

- This syllabus is an agreement, continued registration in this course means that you agree to the policies and procedures outlined in this syllabus.
- This syllabus is intended to give the student guidance in what may be covered during the semester and will be followed as closely as possible. However, the instructor reserves the right to modify, supplement, and make changes as needed.
- Please feel free to contact me about any concerns or comments you may have about this course. It is my hope you will have a positive, successful, and rewarding experience at Santa Rosa Junior College.

Section # 4652 Mondays 3 -6 PM, Room: 1275 Barnett Hall

Week	Date	Topic	Assignment Due
1	January 13	Introduction and Syllabus Overview of Course What is Case Management? Goals of Case Management Roles of Case Manager Chapter 1 Homework assigned	None
2	January 20	MLK Day holiday	None – no class meeting
3	January 27	Chapter 1: Intro to Case Management Case Note Practice Calendaring In-Class Exercise; Video Chapter 5 Homework assigned SAMHSA reading info given	<input type="checkbox"/> Read Chapter 1 <input type="checkbox"/> Study the syllabus and be sure of expectations <input type="checkbox"/> <b>Chapter 1 Homework</b>
4	February 3	Chapter 5: Assessment Phase Application, Interview Documentation In-Class Exercise; Video Chapter 6 Homework assigned	<input type="checkbox"/> Read Chapter 5 <input type="checkbox"/> Read Chapter 2 of SAMHSA Tip 27 <a href="http://www.ncbi.nlm.nih.gov/books/NBK64857/#A50057">http://www.ncbi.nlm.nih.gov/books/NBK64857/#A50057</a> <input type="checkbox"/> <b>Chapter 5 Homework</b>
5	February 10	Chapter 6: Intake Interviewing Communication, Interviewing & Pitfalls In-Class Exercise Intake Report #1 assigned Handout reading assigned	<input type="checkbox"/> Read Chapter 6 <input type="checkbox"/> <b>Chapter 6 Homework</b> <input type="checkbox"/> <b>Intake Interview Meeting (Client #1), in-class</b> <input type="checkbox"/> <b>Write case notes on intake interview in class</b>
6	February 17	President's Holiday	None – no class meeting
6	February 24	Chapter 6: Intake (continued) Handout Intake Report #2 assigned Article: Clients with Special Needs	<input type="checkbox"/> Read Chapter 6 <input type="checkbox"/> Finish Intake Interview Meeting (Client #1) in-class <input type="checkbox"/> <b>Intake Interview Meeting (Client #2), in-class</b> <input type="checkbox"/> <b>Write case notes on intake interview in class</b>
7	March 2	Chapter 7: Service Planning Discuss Intake #1: revise #2 Plan Development In-Class Exercise Plan Writing Examples Finalized Plan #1 assigned Chapter 7 homework assigned	<input type="checkbox"/> Read Chapter 7 & Article: Clients with Special Needs <input type="checkbox"/> <b>Intake Report on Client #1</b> <input type="checkbox"/> <b>Plan Development Meeting (Client #1), in class</b> <input type="checkbox"/> <b>Write case notes on plan development meeting in class</b> <input type="checkbox"/> <b>Prepare Service Plan Draft on Client #1 in class</b>
8	March 9	Chapter 7: Planning (continued) In-Class Exercise Finalized Plan #2 assigned Maslow's Hierarchy of Needs  Midterm Review	<input type="checkbox"/> <b>Intake Report on Client #2</b> (may handwrite changes in class) <input type="checkbox"/> <b>Plan Development Meeting (Client #2), in class</b> <input type="checkbox"/> <b>Write case notes on plan development meeting in class</b> <input type="checkbox"/> <b>Prepare Service Plan Draft on Client #2 in class</b>

Section # 4652 Mondays 3 -6 PM, Room: 1275 Barnett Hall

Week	Date	Topic	Assignment Due
10	March 16	Spring Break	None – no class meeting
11	March 23	Midterm (Ch. 1, 5, 6, 7) Review Plan #1	<input type="checkbox"/> Chapter 7 Homework <input type="checkbox"/> Meet with Client #1 for signature on plan, in class <input type="checkbox"/> Finalized Service Plan & Referral Plan on Client #1 <input type="checkbox"/> Midterm
12	March 30	In-Class Exercise Information and Referral website Info & Referral assignment given	<input type="checkbox"/> Meet with Client #2 for signature on plan, in class <input type="checkbox"/> Finalized Service Plan & Referral Plan on Client #2 <input type="checkbox"/> Write case notes on plan development meeting in class
13	April 6	Chapter 8: Building a Case File Making Referrals Plan Monitoring In-Class Exercise Progress Report #1 assigned	<input type="checkbox"/> Read Chapter 8 <input type="checkbox"/> Information and Referral website homework <input type="checkbox"/> Meet with Client #1 for Plan Monitoring in class <input type="checkbox"/> Write case notes on plan monitoring meeting in class
14	April 13	Chapter 9: Service Coordination Video Chapter 10: Working Within Organizations Progress Reports Mission Statements Case Conferencing Case Studies: In-Class Exercise Progress Report #2 assigned	<input type="checkbox"/> Read Chapter 9 & 10 <input type="checkbox"/> Progress Report on Client #1 <input type="checkbox"/> Meet with Client #2 for Plan Monitoring in class <input type="checkbox"/> Write case notes on plan monitoring meeting in class
15	April 20	Instructor at conference	None – no class meeting
16	April 27	Chapter 4: Ethical & Legal Issues Using Clients' Language Duty to Warn Time Management In-Class Exercise	<input type="checkbox"/> Read Chapter 4 & 11 <input type="checkbox"/> Case Notes on Client #1 or #2 <input type="checkbox"/> Progress Report on Client #2
17	May 4	Quiz (Ch. 4 & 8 -11) Chapter 11: Surviving as Case Manager Closing Reports Boundaries and Self Care In-Class Exercise Closing Report assigned	<input type="checkbox"/> Study for Chapter Quiz <input type="checkbox"/> Quiz on Chapters 4 and 8 -11 <input type="checkbox"/> Meet with Client #1 & #2 for Closing Report in class
18	May 11	Review Chapter Quiz; Evaluation Strength-based approach Review for Final Exam	<input type="checkbox"/> Closing Report on one client – you choose
19	May 18	<b>Final Exam</b> <b>Monday 1PM – 3:45PM</b>	<input type="checkbox"/> Final exam <input type="checkbox"/> Attendance