

## **P-2302 Assigning Participants Receiving Reach Up Benefits (continued)**

### **P-2302C Transferring Participants to a New Case Manager or Career Coach (24-06)**

#### **A participant requests a new Case Manager or Career Coach**

If a participant requests a new case manager or career coach the Reach Up Supervisor should contact the participant to discuss the reason for the switch. If there is any problem solving that can be done between the participant and case manager or career coach, the Reach Up Supervisor should try to facilitate a meeting. If the participant does not want to continue working with the case manager or career coach the Reach Up Supervisor should reassign the participant.

The new case manager or career coach should contact the assigned participant within three (3) business days and offer the participant a meeting within ten (10) business days in their preferred location, including office, community, home and virtual.

#### **Transferring from a Case Manager to a Case Manager**

If a case manager is working with a participant and their goals are education, training, or employment related. The case manager can discuss the possibility of working with a career coach with the participant. If this is something they are interested in, the case manager should discuss it with the Reach Up Supervisor. The Reach Up Supervisor will consider case load size and availability. If the career coach has availability the Reach Up Supervisor will assign the participant to a career coach.

The case manager should not go directly to the career coach with a "referral".

#### **Transferring from a Career Coach to a Case Manager**

If a career coach is working with a participant and their goal is no longer related to education, training, or employment the career coach will work with the participant to help them identify a new goal.

If the goal has changed due to an obstacle (new or existing) the career coach will work with the participant to overcome the obstacle.

If the obstacle will permanently or longer term (longer than 6 months) affect the participants ability to focus on an employment, education, or training goal(s) the

career coach will discuss with the VABIR Program Manager. If after the discussion they both determine transferring the participant to a case manager is appropriate they will review at their monthly meeting with the Reach Up Supervisor. The Reach Up Supervisor, VABIR Program Manager, and career coach will determine the best next steps for the participant. If it is determined transferring to a case manager is the appropriate next steps the Reach Up Supervisor will reassign the participant.

If the goal has changed due to the participant's interest. The career coach will continue to support and coach the participant towards employment, education, and training goal.

### **How to transfer a participant between case manager and career coach?**

The Reach Up Supervisor will notify the newly assigned case manager or career coach by sending an email to the case manager with the participant's name and full SSN.

The previous case manager or career coach will contact the participant and explain the transfer. They will offer a 3-way meeting between the participant, previous case manager, and career coach. If the participant accepts the 3-way meeting the meeting should be held within ten (10) business days. If the participant does not want a 3-way meeting. The new case manager or career coach should contact assigned participants within three (3) business days and offer the participant a meeting within ten (10) business days in their preferred location, including office, community, home and virtual.