# **Logo for Montana Department of Labor and Industry. The logo is several people hold hands around the center of a wheel.Division: Workforce Services Division**

**Category: Programs**

**Effective Date: 10/1/2021**

**Last Revised: 10/1/2021**

**Policy No.: 04-16**

Health and Economic Livelihood Partnership (HELP) Link

Policy – Career Coaching and Case Management

Background

HELP-Link services are provided by contractors outside of state government and awarded through a competitive procurement process. Contractors/career coaches are responsible for documenting and maintaining up to date and accurate client records and adhering to all applicable regulations.

Scope

This policy applies to all MTDLI HELP-Link contractors and MTDLI Central Office staff. This policy is effective October 1, 2021.

# Policy

* Each enrolled HELP-Link client is assigned a 1:1 career coach that helps guide them through the process of making career decisions based on the local economy.

# Documentation - Case Notes

* Case file information must clearly document and justify all actions taken and decisions made during eligibility and appropriateness determination and during services.
* Case file documentation must only contain pertinent, factual, and necessary information needed to provide HELP-Link services. Case notes must record a detailed and chronological description of the current status of each client.
* The following must never be included in the case file:
  + Specific medical diagnosis/conditions and information
    - Includes but is not limited to: medical or mental health information, drug/alcohol related information, pregnancy, and disability information
  + Specific criminal information
  + Legal information
  + Domestic violence information
  + Child custody information
* HELP-Link eligibility is protected under the Health Insurance Portability and Accountability Act (HIPAA), Health Information Technology for Economic and Clinical Health (HITECH) Act, and Medicaid regulations and must follow all privacy and security rules.

# Release of Information

* Case file documentation and Personally Identifiable Information (PHI) will not be released without the client’s written authorization, unless specifically provided by law. Authorization is voluntary.
* Required elements of an authorization include:
  + Client name
  + Specific description of the information being released
  + Purpose for the information being released
  + Name/entity to whom the information is being released
  + Name/title/entity and signature of releasing individual
  + Expiration date/event of the authorization
  + Signature and date of client (or client’s representative in rare circumstances)
* Only the minimum amount of information necessary to fulfill the purpose of the release is allowable.

# Record Retention

* All records generated or created (written or electronic) during the contract period must be retained for eight (8) years following the contract completion date.

# Accessibility

* Access to case file information is only allowable to individuals who are required as part of their job duties.
* Upon request, copies of case records (including case notes) are to be made available to the client.

# Administrative Requirements

* Feedback to and from both DPHHS and MTDLI to communicate client involvement in HELP-Link and services provided.
* Provide data and information to legislative subcommittees regarding program participation, expenditures, and outcomes.
* Provide data and reports to DPHHS as needed.

# Oversight and Evaluation

* Oversight and evaluation will be conducted by the Program Manager and/or designee(s).

# References

* [2015 Montana Legislature Senate Bill 405](https://leg.mt.gov/bills/2015/billhtml/SB0405.htm)
* [2019 Montana Legislature House Bill 658](https://leg.mt.gov/bills/2019/billhtml/HB0658.htm)
* 2021 Montana Legislature House Bill 614
* [Montana Code Annotated (MCA), 39-12](https://leg.mt.gov/bills/mca/title_0390/chapter_0120/part_0010/sections_index.html)