SOCIAL SERVICES
BLUEPRINT
SOLUTION

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Utah Social Services Blueprint
TOOL GUIDE

Use this tool to find the clients you may have in common with other social service programs right now, and start working together.

STEPS

1

Find a Potential Match

Make sure you're connected to the state network, and login with your normal work credentials to blueprint.utah. gov. The preferred browser for this tool is Chrome.

Click on your clients listed to see their potential matches

Explore the details surrounding each match

2

Verify the Match

Reach out by clicking on the name of the case manager listed with the potential match. (Note: Follow these instructions to enable pre-written emails to case managers.)

To verify the match, describe the client, where they live, their household, and how long you've worked with them, etc.

- E.g. "I've worked with _____ and their children of these ages, for four months in Salt Lake City. Does that sound like who you are working with?"

3

Coordinate the Services

If you've verified the match, ensure that you have client consent, and then begin working together. You might start with these questions:

- What is this client's status?
- Why are they involved in your program?
- What services are you currently offering them? What are they working on right now? (Note: additional release required to share physical docs)

Unify the client's focus. Do their current commitments address their most important and immediate needs?

- Should commitments be staggered or removed in order to keep the client focused on priorities in order?
- What support and resources can we each contribute to prioritize their focus?

TRAINING VIDEOS

1. Introduction to the Blueprint Solution
2. Introduction to the Client Page
3. Exploring Potential Matches
4. Acting on a Match
5. Exploring the Milestone Page

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FAQs

What is this tool for?

Case managers should use this tool to find potential matches between their clients and those also recorded as currently engaged with other programs. For simplicity's sake, a "case manager" also refers to a caseworker, counselor, or AP&P officer.

When should I use this tool?

On an ongoing basis, use this tool when:
- When you receive an email notification of a new match (upcoming feature)
- The day after receiving a new client to your caseload or registering their application
- Forming teams with clients
- Closing the loop on direct referrals
- If UDC, as an offender in prison approaches release

It's also up to you whether you want to set a reminder every other week or so to login and check out any recent matches.

Where does this information come from?

This tool draws information from the software in which you generally organize your clients (AWARE, CARE, O-TRACK, SAFE, UWORKS).

How up to date is this information?

This information refreshes each morning at about 10 AM. If your caseload changed today, those changes will reflect tomorrow in this tool. Data about historic clients who are no longer actively served are NOT stored by this tool.

Tell me about security and access permissions to this tool.

Users must be on the state network in order to access the tool at blueprint.utah.gov. Users are identified when they login according to their roles. Therefore, they will only see those clients who have potential matches with whom they have a current engagement directly or in a supervisory manner.

Why are some of my clients not listed in the tool?

The tool will only display your clients who have potential matches, in order of the clients with the highest to lowest match scores.

What can I search for?

Search for clients by any of the identifying information you have for your client. This includes fields like their phone numbers, which are not displayed but can be used for filtering the list of clients that you see.

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What determines the match score?

The matching process determines similarities between individual records from two programs at a time using the names, birth date(s), and social security number(s) of the client which are available. The process produces match scores for as many of the three fields that it can match together. Then, it combines those scores into the overall score that you see. The matching seeks to capture as many true matches as possible based on the information provided, meaning that several "false positive" matches will be surfaced in the tool.

What does the 'Add to Team' checkbox do?

The 'Add to Team' button is for your note taking purposes only, and does not reflect in the tool of the other case manager which you have selected. The button will come already checked if the match has been determined exact or very near exact. You can also check it to affect which milestones that you see integrated on the milestone page.

What's on the milestone page?

For those whose 'Add to Team' box has been checked, their available case plan information is integrated in the milestone page. For the time being, two programs are currently contributing case plans: the Department of Corrections and Vocational Rehabilitation; other programs' case plans are expected at later dates. Use the milestone page to become familiar with the client's work so far, current commitments, and potential points in which progress has stalled.

Do I have consent to discuss this client and their services with the other case manager?

Once you have verified the client match, make sure that you have the appropriate agreements to work together. The client's consent or agreement is especially important to receive before discussing their sex offender status, mental health, substance abuse, or other health information. Note, an additional release is also necessary before exchanging physical or written documents.

What if there are competing requirements for programs working together with a client?

Sometimes some requirements are court-ordered and non-negotiable. Your expertise as a case manager is trusted to balance the needs of the client in a sensible sequence one milestone at a time, which might look like:
1. Maintain basic needs (food, shelter, critical physical/mental health, safety)
2. Maintain freedom (not incarcerated)
3. Maintain family (keep kids and remain in the home)
4. Build self-reliance

What should I do after I have reached out to a case manager, but they aren't responding?

Any normal reason, including vacation, might delay a response to your outreach. First, return to this tool to ensure that the other potential case manager for your client has not changed. Then, follow up a second time if needed. If the nonresponse continues, you can forward your outreach to that case manager's supervisor.

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