

Definitions/Comments

Case Management Society of America
(CMSA) definition for case management (per our staff is the "gold
standard" definition):

"Case management is a collaborative process of assessment, planning,
facilitation and advocacy for options and services to meet an
individual's health needs through communication and available resources
to promote quality cost-effective outcomes."

Just to add to her definition, the Commission for Case Manager
Certification (CCMC) definition is quite similar (page 11: section " A
Definition of Case Management").

"Case management is a collaborative process that assesses, plans,
implements, coordinates, monitors, and evaluates the options and
services required to meet an individual's health needs, using
communication and available resources to promote quality, cost-effective
outcomes."

In that same section of the Case Manager's Handbook, it describes the
expansion of definition, ".....across the continuum of care.....",
adding ".....psycho-social..... to the individual's needs, and speaks
that case management ".....offers.....the best use of health care
dollars....."

Our definition should reflect the comprehensive care coordination across the
health, social, behavioral, family spectrum.

Case Management is a collaborative, client-driven strategy for the provision
of quality health and support services through the effective and efficient
use of available resources in order to support the client's achievement of
goals related to healthy life and living in the context of the person and
their ability.

In Carol Austin's book, "Perspectives on Case Management Practice" she sites the following definition by
Scott Geron which I think addresses the consumer focused nature of the role;

Case management is a service that links and coordinates assistance from both paid service providers and
unpaid help from family and friends to enable consumers to obtain the highest level of independence
consistent with their capacity and their preference for care.

NASW Standards for Social Work Case Management

Prepared by the Case Management Standards Work Group
Approved by the NASW Board of Directors, June 1992

Definition

The practice of case management varies greatly across social work settings and is even more diverse as applied by other professionals. Despite this diversity, several elements distinguish social work case management from other forms of case management.

Social work case management is a method of providing services whereby a professional social worker assesses the needs of the client and the client's family, when appropriate, and arranges, coordinates, monitors, evaluates, and advocates for a package of multiple services to meet the specific client's complex needs. A professional social worker is the primary provider of social work case management. Distinct from other forms of case management, social work case management addresses both the individual client's biopsychosocial status as well as the state of the social system in which case management operates. Social work case management is both micro and macro in nature: intervention occurs at both the client and system levels. It requires the social worker to develop and maintain a therapeutic relationship with the client, which may include linking the client with systems that provide him or her with needed services, resources, and opportunities. Services provided under the rubric of social work case management practice may be located in a single agency or may be spread across numerous agencies or organizations.

Goals

The primary goal of case management is to optimize client functioning by providing quality services in the most efficient and effective manner to individuals with multiple complex needs. Like all methods of social work practice, case management rests on a foundation of professional training, values, knowledge, theory, and skills used in the service of attaining goals that are established in conjunction with the client and the client's family, when appropriate. Such goals include

- enhancing developmental, problem-solving, and coping capacities of clients
- creating and promoting the effective and humane operation of systems that provide resources and services to people
- linking people with systems that provide them with resources, services, and opportunities
- improving the scope and capacity of the delivery system
- contributing to the development and improvement of social policy.

Tasks and Functions

Although the roles and responsibilities of individual social work case managers can vary considerably depending on program or system objectives, social work case managers perform a range of common tasks related to client-level intervention and system-level intervention.

Client-Level Intervention

Once the social work case manager has identified and engaged clients as a result of outreach or referral activities, he or she conducts a face-to-face comprehensive assessment with each client of that client's strengths and limitations and of the social, financial, and institutional resources available to the client. The social work case manager focuses particularly on how these resources relate to the principal concerns identified during the assessment. On the basis of this assessment, the social worker develops an individualized service plan with the client that identifies priorities, desired outcomes, and the strategies and resources to be used in attaining the outcomes. The responsibilities of the social worker, the client, and others should be clarified throughout development of the plan. The direct contact between social worker and client is essential to effectively accomplish the assessment and service plan development.

Additional social work case management tasks related to client intervention include implementing the service plan aimed at mobilizing the formal and informal resources and the services needed to maximize the client's physical, social, and emotional well-being, and coordinating and monitoring service delivery. The social work case manager

also advocates on behalf of the plan for needed client resources and services; periodically reassesses client status, the effectiveness of interventions, and the attainment of outcomes with revision of the service plan as indicated; and terminates the case.

At all stages of client intervention, it is crucial that the social work case manager be granted sufficient authority to access, allocate, monitor, and evaluate service and fiscal resources. Such authority is a prerequisite of effective case management practice. Optimal control over and management of scarce resources may be more readily achieved in delivery systems structured with a single point of entry and integrated funding. Case managers will be more effective in delivery systems that are designed to reduce fragmentation

From discussion at meeting:

The shared values that emerged were:

Consumer direction

Interdisciplinary, holistic approach

The shared elements of care management that emerged were:

Assessment

Service planning, initiation, and monitoring

Linkage to community resources across systems as well as to resources within a network

Consumer education

The challenges associated with care management identified were:

Remembering the purpose of care management system is to manage services not the person.

Defining the role and scope of responsibility of the care manager

Case load sizes

Care Management protocols based on the acuity level of the consumer

Inconsistent care management practices within a system

The group described the characteristics of unified care management as:

Consumer focused and directed

Educating and equipping consumers to manage their care to the extent they are willing/able.

Efficient use of resources within budget constraints

Recognizes and incorporates informal caregiver supports

Recognizes and supports cultural considerations

Appropriate care in the appropriate setting

Facilitating across systems to Link consumers to the right service/right model

DRAFT

Proposed Definition of Care Management:

Care Management is a holistic, collaborative, client-driven strategy for the provision of quality health and support services through the effective and efficient use of available resources in order to support the client's achievement of goals related to healthy life and living in the context of the person and their ability.