

What is Case Management?

DEFINITION OF CASE MANAGEMENT*

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.

PHILOSOPHY OF CASE MANAGEMENT**

Case management is an area of specialty practice within one's health and human services profession. Its underlying premise is that everyone benefits when clients* reach their optimum level of wellness, self-management, and functional capability: the clients being served; their support systems; the healthcare delivery systems; and the various payer sources.

Case management facilitates the achievement of client wellness and autonomy through advocacy, assessment, planning, communication, education, resource management, and service facilitation. Based on the needs and values of the client, and in collaboration with all service providers, the case manager links clients with appropriate providers and resources throughout the continuum of health and human services and care settings, while ensuring that the care provided is safe, effective, client-centered, timely, efficient, and equitable. This approach achieves optimum value and desirable outcomes for all—the clients, their support systems, the providers, and the payers.

Case management services are optimized best if offered in a climate that allows direct communication among the case manager, the client, the payer, the primary care provider, and other service delivery professionals. The case manager is able to enhance these services by maintaining the client's privacy, confidentiality, health, and safety through advocacy and adherence to ethical, legal, accreditation, certification, and regulatory standards or guidelines.

Certification determines that the case manager possesses the education, skills, knowledge, and experience required to render appropriate services delivered according to sound principles of practice.

** "Client" refers to the recipient of case management services, and can include (but is not necessary limited to) consumer, client, or patient.*

* Definition as provided by the 2002 CMSA Revised Standards of Practice

**Excerpts from the Certification Guide (11/05) available from the Commission for Case Manager Certification
847-818-0292

WHAT DOES A CASE MANAGER DO?

A Case Manager serves as a liaison between the ill or injured person, the doctor and other treating providers, the insurer and employers to identify what services might be needed. We then help coordinate all services and resources necessary to promote a return to the best level of well-being. We meet with people in person, or by telephone, and often create letters and reports, all to enhance communication between all parties and the insurance company. We help the person who is sick and their family navigate the healthcare system, providing resources that will be needed to return to a productive life-style.

WHY DO YOU NEED CASE MANAGEMENT?

We expect to help you and your family cope with the medical, social, emotional, insurance, and vocational problems related to injury or illness. We can support you in making informed decisions and in getting answers to questions about your treatment and your rehabilitation. We assist you in getting the care you need. We do not make decisions for you but rather help give you the tools you need to do so. You can determine if we can be helpful to you.

WHO MIGHT REFER YOU TO A CASE MANAGER?

Individuals who have specific illness or injury are generally referred for Case Management service by their insurance claims adjuster, physician or employer.

WHO PAYS FOR CASE MANAGEMENT SERVICES?

The referring source, generally the insurance company, pays for the Case Manager's service. Sometimes a case manager is hired directly by the provider, patient or family.

The Case Management Society of New England is available to talk to community groups regarding the role of the Case Manager. If interested please contact 603-329-7481. Thank you for your interest.

**This product was developed by The Case Management Society of New England – please feel free to duplicate as needed. Revised 4/10/06*