

**Navigating
Chaos for
Hospital Case
Managers while
Stabilizing
Throughput**

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**Vascular Trauma Case
Manager**

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DISCLOSURES

This presentation will provide information to the audience based on the presenter’s experience and evidence-based examples of how case managers work in the throughout at acute care hospitals. This presentation is not supported by any outside companies or designed to promote products or AI systems.





OBJECTIVES

1

OBJECTIVE 1

Explain the Hybrid staffing model for acute care case managers challenged with daily absenteeism.

2

OBJECTIVE 2

Review use of telehealth, AI and EHR resources in daily collection of analytics to manage a successful patient-centered care program.

3

OBJECTIVE 3

Articulate the challenges and considerations with coordinating, communicating, and training staff within this Hybrid model for case managers.

Throughput Defined

Optimizing the flow of patients through various departments and stages of care to ensure efficiency, timely care and patient satisfaction from admission to discharge.

Enhance communication and collaboration:

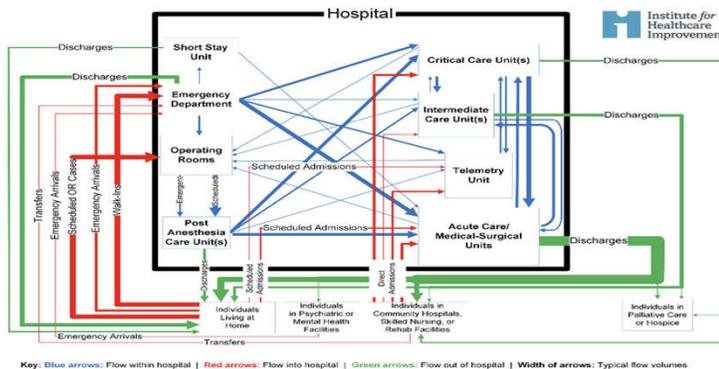
- Establish clear communication channels
- Improve team collaboration
- Implementation of role-based communication




Institute for Healthcare Patient Flow

WHITE PAPER: Achieving Hospital-wide Patient Flow (Second Edition)

Figure 1. System Map: Patient Flow in the Hospital



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Evaluating Hospital Throughput

- Essential component to managing throughput is evaluating throughput
- Analyzing readmissions
- Recording delays
- Examining if the patient is at the right level of care at the right time
- Designing a system where initial UM starts in the ED along with triaging patient care



Ethical Principles: CCMC 2023, CDMS 2023, CRCC 2023; Principles 1, 2, 3, 4, 7: CCMC 2023, CDMS 2023

Ethical Definitions

- ADVOCACY:** The act of recommending, pleading the cause of another; to speak or write in favor of.
- AUTONOMY:** Agreement to respect another's right to self-determine a course of action; support of independent decision making.
- BENEFICENCE:** Compassion; taking positive action to help others; desire to do good; core principle of client advocacy.
- FIDELITY:** The ethical principle that directs people to keep commitments or promises.
- JUSTICE:** The ethical principle that involves the idea of fairness and equality in terms of access to resources and treatment by others.
- NONMALEFICENCE:** Duty to do no harm.

CCMC 2023, CDMS 2023, CRCC 2023



Code of Professional Conduct



Commission for Case Manager Certification

Board-certified case managers will:

- Principle 1:** public interest above their own.
- Principle 2:** respect the rights and inherent dignity of all of their clients.
- Principle 3:** always maintain objectivity in their relationships with clients.
- Principle 4:** act with integrity and fidelity with clients and others.
- Principle 7:** will obey all laws and regulations.

Standards: Section 1: The Client Advocate
Standards: Section 3: Case Manager/Client Relationships. S10 Relationship with Clients



Commission for Case Manager Certification (CCMC). Code of Professional Conduct for Case Managers. 2023.

Code of Professional Conduct



Board-certified disability management specialists shall:

- Principle 1:** public interest above their own.
- Principle 2:** respect the integrity, dignity, and protect the welfare of those persons or groups with whom they are working.
- Principle 3:** always maintain objectivity in relationships with clients.
- Principle 4:** act with integrity and dignity in dealing with other professionals
- Principle 7:** obey all laws and regulations, avoiding any conduct or activity that could harm others.

- RPC 1.03** - Competence
- RPC 1.08** - Objectivity
- RPC 1.14** - Conflict of Interest



Certified Disability Management Specialist (CDMS). Code of Professional Conduct, 2023.

Code of Professional Ethics

Ethical Principles:

- Autonomy
- Beneficence
- Fidelity
- Justice
- Nonmaleficence
- Veracity

Enforceable Standards of Ethical Practice

- Section A: The Counseling Relationship
- Section C: Advocacy and Accessibility
- Section F: Relationships with Other Professionals and Employers



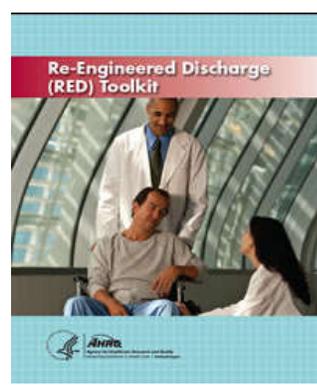
(2023)



Commission on Rehabilitation Counselor Certification (CRCC). [Code of Professional Ethics for Certified Rehabilitation Counselors](#), 2023.

Readmission Models

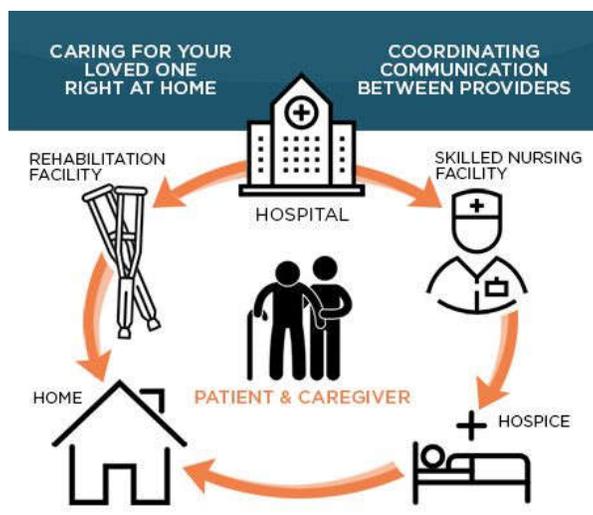
- Project Red
- Care Transitions
- Project Boost
- Ideal Discharge
- Naylor Transition of Care Model



Principles 2, 3, 4, 7: CCMC 2023, CDMS 2023



Care Transitions Model



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Readmissions Examination



Tools to measure readmissions Lace score, Hospital score, patient score.



Examination of time before return and analysis if what broke down to return patient literacy understanding of discharge follow-up and medications.



Social determinants of health transport, housing, access to caregiver support, medications, groceries and ability to safely mobilize.

Principles 3, 4, 7: CCMC 2023, CDMS 2023; Section C: CRCC 2023



Healthy People 2030

- **Attain healthy lives through wellness preventing disease, disability injury and premature death**
- **Eliminate health disparities achieve health equity, health literacy and improve health wellbeing**
- **Create social, physical and economic environments that promote attaining the full potential for health and well being**
- **Promote healthy development behaviors and well being across all life stages**
- **Engage leadership, key constituents and the public health across multiple sectors to design policies to improve health can well being**
- **[Priority Areas – Healthy People 2030 | odphp.health.gov](https://odphp.health.gov)**

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Blue Zone Principles

Blue Zones Power 9®

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MOVE NATURALLY

1. Make daily physical activity an unavoidable part of your environment

RIGHT OUTLOOK

2. Know your purpose
3. Downshift: work less, slow down, take vacations

EAT WISELY

4. Eat until 80% full
5. More veggies, less meat & processed food
6. Drink a glass of red wine each day

BELONG

7. Create a healthy social network
8. Connect/reconnect with religion
9. Prioritize family

BLUE ZONES PROJECT
by HEALTHWAYS

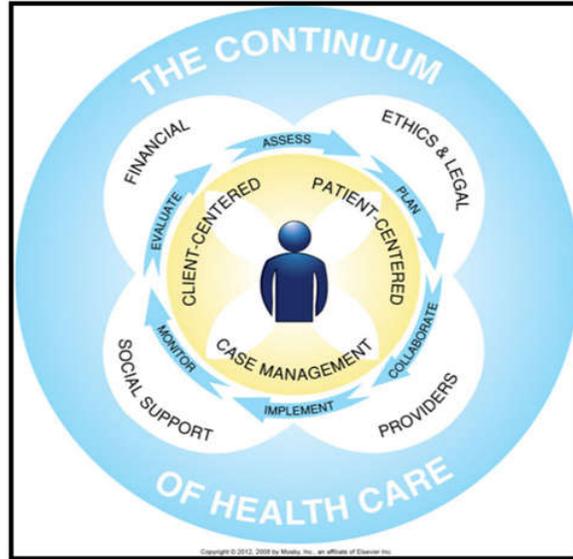
Brought to Hawaii by

Readmissions and Impact of Readmissions

- Disruption of recovery
- Prolongs illness
- Creates physical discomfort
- Emotional distress for patient
- Repeat hospitalization increase healthcare costs out of pocket expenses
- Deductibles, copays, and lost time at work
- Chronic conditions and readmissions

Principles 3, 4, 7: CCMC 2023, CDMS 2023; Section A: CRCC 2023

The Continuum of Healthcare



Standards of Practice

- Professional Responsibilities / Outcomes
- Legal / Ethics
- Advocacy
- Resource Management
- Health Information Technology
- Client Assessment
- Identifying Care Needs and Opportunities



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Ethical Implications

- Diversity
- Equity
- Equality
- Inclusion
- Ethical Principles



Principles 2, 3, 4, 7: CCMC 2023, CDMS 2023; CRCC 2023



Ethical principle of Case Management UM/Denial mgt

The ethical obligation of case management is to have the knowledge and ability to appeal insurance denials in order to access a patient's necessary healthcare to create optimal patient outcomes.

Principle 1 or Principle 4 and Principle 5 CCMC



Hospital Capacity Challenges

- ED long waits, *is it resource allocation?*
- Overcrowding
- Boarding long length of stay in ED and inpatient units



Principles 2, 3, 4, Standard 1: CCMC 2023; RPC 1.03, RPC 1.08, CDMS 2023; Section A & C: CRCC 2023



The UM Process



CMS CONDITIONS OF PARTICIPATION FOR CM/UM



CM/UM PURPOSE AND CROSSOVERS



STATUS MANAGEMENT



LENGTH OF STAY MANAGEMENT ACROSS THE HEALTHCARE CONTINUUM

CM Discharge Planning Process and How UM Formulates Your Plan

Key Components:

Assessment

Planning

Coordination

Education

Follow-up

Transitions of care

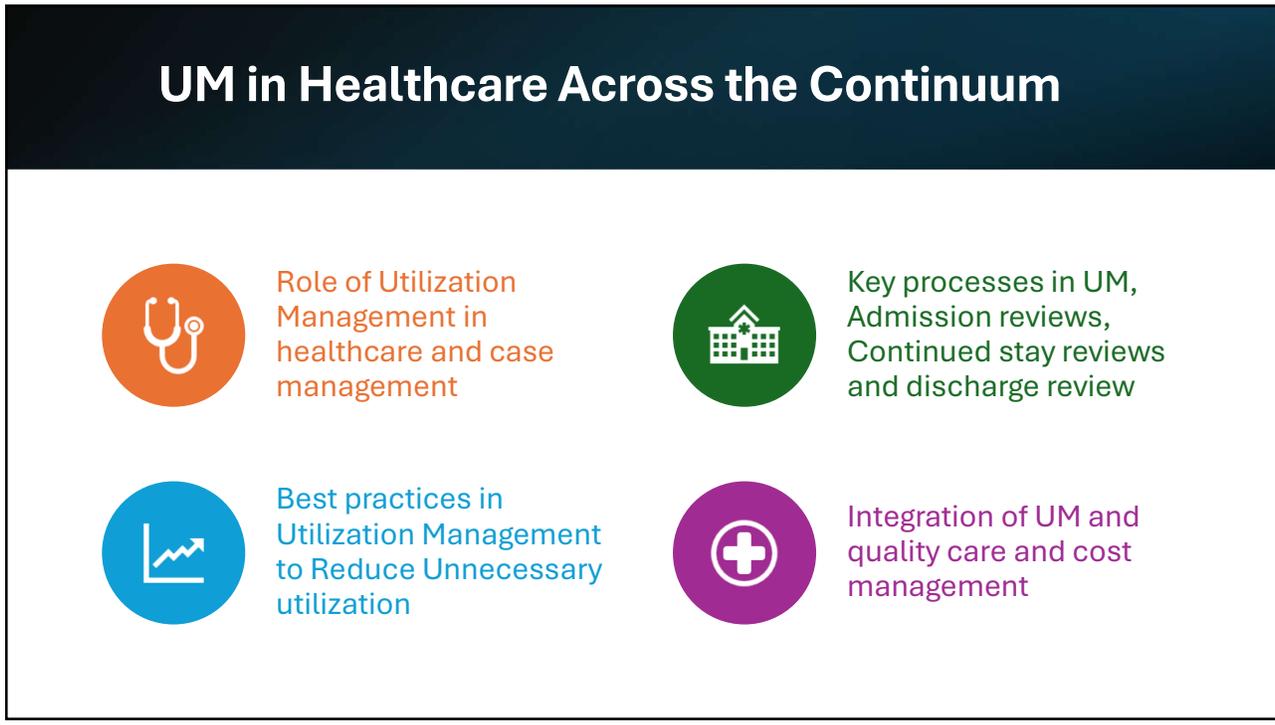
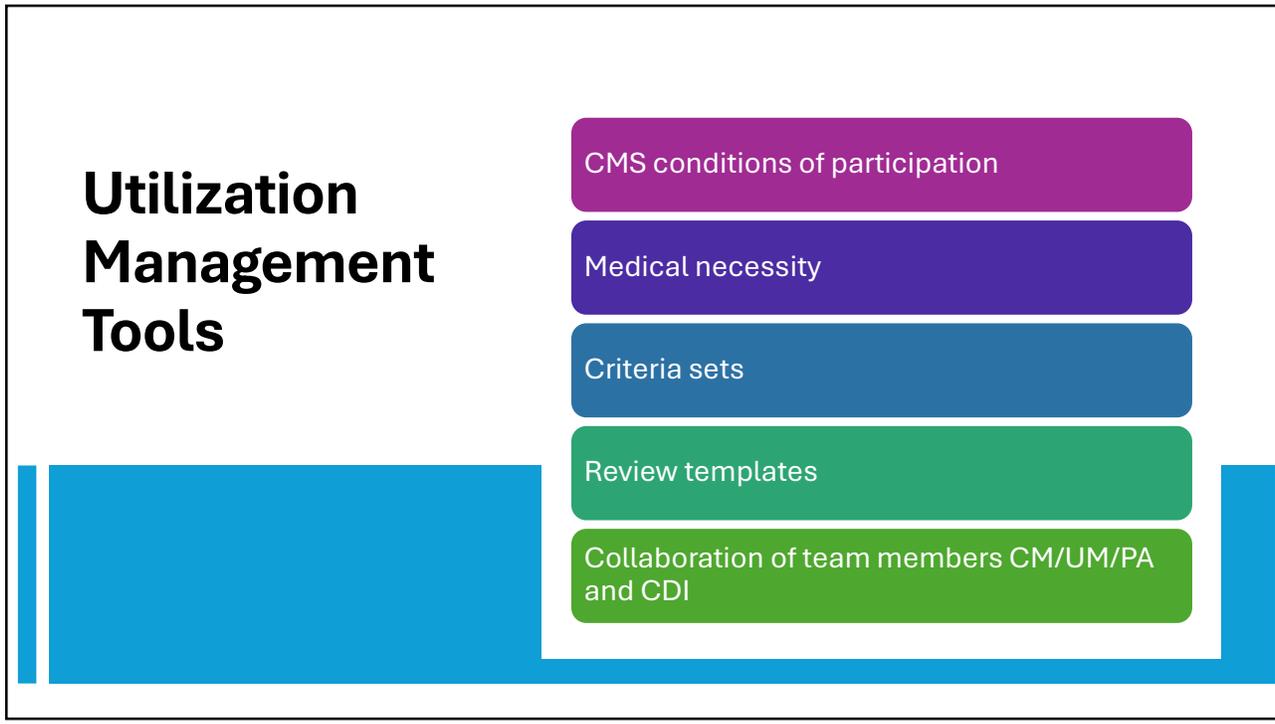
Best practices for reduction of unnecessary overutilization

Utilization Management as a Framework for Transitions of Care

UM determines the appropriateness of the prescribed treatment to ensure a high quality of care and prevent unnecessary procedure. It is broken down into phases:

- Initial Review ED
- Prospective
- Concurrent
- Retrospective

Always placing the patient at the right level at the right time receiving the right care for the diagnosis.



Triaging Hospital vs Community Care

What level of care is best for the patient?

- Hospital
- Community care
- Urgent care/ED
- PCP



Principles 2, 3, 4: CCMC 2023; RPC 1.03, RPC 1.08, RPC 1.14: CDMS 2023



Strategies

Case managers offer a unique perspective to patient transfers, and access due to their knowledge of clinical status, level of care, revenue cycle, authorization process, care coordination, progression of care and discharge barriers.



The Impact of Case Management on the Healthcare System

INTRODUCTION TO CASE MANAGEMENT

Factors impacting the current healthcare landscape, such as the rise in the aging population, chronic conditions, and costs, have stressed the healthcare system. As a result, healthcare stakeholders are seeking novel operational care approaches and solutions that meet the needs of services provided. The demand for specialized health professionals capable of supporting individuals and their caregivers as they navigate through complex and fragmented healthcare settings has increased.

Case management has become essential in improving the management of complex physical, psychological, and/or social components of health. It supports the goals of case management, such as providing standardized strategies that support better quality, improved outcomes, and high or improved satisfaction. Case management serves to address complex medical and insurance through advocacy, communication, education, identification of service resources, and service facilitation.

WHAT IS CASE MANAGEMENT?

Case management is a collaborative process of assessment, planning, facilitating, coordinating, and advocating for systems and services to meet the health and functional needs of individuals and families. Collaborative health needs through comprehensive and available resources to promote patient safety, quality of care, and cost-effective outcomes. The professional case manager operates the process based on their degree of practice using critical thinking and evidenced-based knowledge.

WHO ARE PROFESSIONAL CASE MANAGERS?

Case managers are healthcare professionals who serve as direct advisors, supporters, and coordinators care for patients, families, and caregivers in the complex health and medical systems. They work as the center of communication, connecting individuals/caregivers with members of the care team and coordinating to meet care and clinical goals through management and patient education.

ABOUT CASE MANAGEMENT PRACTICE

Case management is a specialty practice rooted in person-centered care and advocacy. It involves the timely care coordination of quality services to address an individual's specific health needs and preferences in a cost-effective, safe manner to promote optimal outcomes. Case Management practice is provided by nurses, social workers, pharmacists, physicians, and other qualified healthcare professionals through access to clinical, direct patient care, financial, and insurance case expertise to case across the healthcare system.

Case managers support an evidence-based approach to assess patients/caregivers in achieving their healthcare goals. These efforts promote better clinical and financial outcomes for individual patients/caregivers and the population. Effective case management positively impacts the healthcare system, especially in aligning with the goals of the quality data which includes increasing health outcomes of individuals/patients, reducing the experience of costs, reducing the costs of care, organizing the care team experience and addressing social determinants of health/health equity.

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Factors Influencing the Throughput

- Staffing
- Communication
- Inefficient systems
- Layout and organization
- Delays in care
- The patient being at the right level of care to receive the right level of treatment



Principles 2, 3, 4, Standard 3: CCMC 2023; RPC 1.03, RPC 1.08, RPC 1.14: CDMS 2023



Staffing

Inadequate staffing slows evaluations, treatments, movement and discharging of patient at every level of the patient care journey.



Communication

Poor communication causes misunderstandings and errors leading to poor patient outcomes. The patient handoff process is a common area for breakdown in communication resulting in delays and mistakes.



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Inadequate Systems



Hospitals have many time consuming and laborious processes and delays in procedures. Staff time spent on administrative paperwork takes valuable time away from providing patient care at the bedside.

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Layouts and Organization

Poor layouts and organization can impede patient flow. When staff spend extra time walking long distances from patient care areas to supply rooms it slows and wastes efficiency.



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Delays in Patient Care

Any factor that delays care will impede patient flow.

- An example is a nurse who cannot access a medication dose and has to call pharmacy and is placed on hold waiting to be connected to the right person to receive the necessary treatment.
- Or a case manager setting up ambulance transport to return a patient back to a facility and ambulance always late despite set time for discharge.



Ways to Improve the Throughput

- Optimizing staff
- Improving communication
- Enhancing efficiency
- Prioritize organization
- Enhance the work environment
- Update technology. EMR AI use
- UM to assist with moving patients to the right level of care

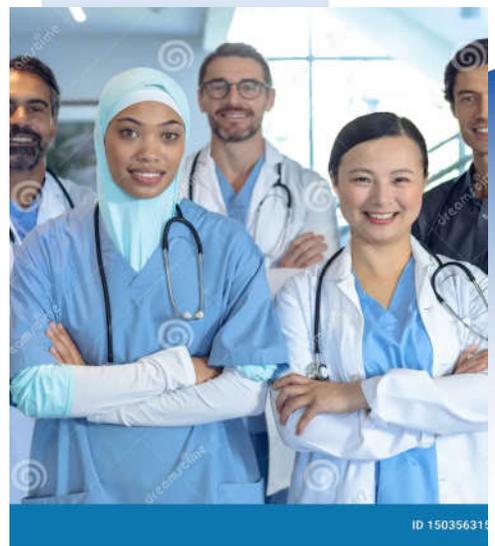


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Patient Care Experience

- ED or Direct Admission**
- Clinical examination
 - Working diagnosis
 - Initial UM
 - Transfer to right level of care

- Hospital Admission**
- Observation unit
 - Medical surgical unit
 - OR
 - ICU
 - CVICU
 - Admission UM
 - GMLOS
 - Continued Stay
 - Discharge Criteria



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Optimizing Staff

Staffing shortages are at an all time high.

Nurses and Social workers in ED, PACU, and procedural departments perform tasks that non-clinical staff could complete.
 *For example: staff transporting patients, discharging patients, cleaning, stocking rooms.

Hiring more certified nursing assistants, transporters, housekeeping staff.

Placing RN and SW in the right roles or models for department efficiency.

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Improving Communication

Good communication is essential for good patient care. The handoff - *although an antiquated procedure* - is one of the most critical tasks to prevent errors, omissions about patients can occur without clear communication.

Technology solutions and EMR create streamlined efficient and transparent networks to facilitate communication for nurses and social workers and non-nursing staff to decrease errors that lead to poor patient outcomes.

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Enhancing Efficiency

- Case managers, Nurses and Social workers are responsible for managing transport from the Emergency Room to other facilities.
- It typically takes up to 45 minutes to arrange transport, make calls, fill out paperwork, fax appropriate clinical data to facilities, look up insurances, and secure authorization for transport and care.
- Streamlining this process saves time and allows staff to focus on direct patient care.

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Prioritizing Organization

- Evaluation the hospital layout can ensure that supplies and equipment are readily available, in convenient locations to improve efficiency.

Example:

- Many procedures and patient care access have supplies for IV setup but the pumps, blanket warmers need to be readily available for patient comfort.
- Quick access to repetitive essential tasks such as ad hcp, medical record release, IM or Moon forms and information on how to setup access to the patient electronic chart.

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Enhancing the Work Environment

Implementing a positive and supportive work environment and culture is essential to improving the throughput and productivity. Employers who invest in employee’s health, wellbeing and wellness see increased morale and happier, productive staff. Employers can promote cultures of teamwork, support, and healthy lifestyles.



Principles 2, 3, 4, Standard 1: CCMC 2023; RPC 1.08: CDMS 2023; Section F: CRCC 2023



Updating Technology

Utilizing HIPPA compliant technology, EMR, and Patient telehealth access are effective ways to streamline communication to both the patient, family, and team members.

This allows the case managers to have direct access to patients, team members, and providers when referring for discharge planning. This communication provides quicker feedback to all team members, referral sources and patient/families - reducing delays and frustration.

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Best Practices in Readmissions Risk Prediction

- Comprehensive Patient Assessment
- Standardized Risk Assessment
- Electronic Health Record and data analysis
- Predictive Analytics
- Interdisciplinary collaboration
- Patient engagement and self-assessment
- Longitudinal data analysis

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Readmissions - What Now?

- Evaluate the reason for readmission
- Stabilize the Patient
- Communicate with patient and family
- Create enhanced Care transitions
- Critical thinking of readmission data to enhance care plan
- Address contributing factors
- Provide education and support
- Implement follow-up and monitoring
- Continuous quality improvement

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Questions?



Thank-you

