**Case Management**

**Typical Learning Experiences of Students Earning Lower-Level Credit:**

* Work in the human service field, with a significant portion of that experience directly related to case management.
* Attend training sessions in areas such as interpersonal skills, supervision, delivery of services, cultural diversity, values and ethics, mental and physical disabilities substance abuse, and financial entitlements.

**Typical Learning Experiences of Students Earning Upper-Level Credit:**

* Work in the human service field, largely in case management, often for more than two years in a supervisory capacity.
* Attend one or more training sessions in the topics listed above. Often play a role in the preparation and delivery of such training sessions to subordinates.
* Applicants for upper level credit in this area are often granted credit in an area more narrowly defined. Common topics for which upper-level credit is awarded are advocacy, linking/referral and team treatment, crisis intervention, individual service planning, daily living skills training and financial entitlements.

**Discussion Topics:**

If you are familiar with some (but not necessarily all) of the following topics you may be eligible for lower-level credit in the area of case management. If you are familiar with advanced questions, you may be eligible for upper-level credit. If knowledge of some of the topics is substantial, you may consider requesting additional credit in more narrowly defined areas.

**Case Management: Definition and Roles**

Facts, definitions, concepts (lower-level):

* Define case management.
* Explain the role of the case manager.
* Describe the preparation one needs in order to effectively perform as a case manager.
* Explain the steps a case manager takes when given an assignment from assessment through evaluation.
* Explain the relationships between managed care and case management.
* Summarize the historical developments that helped/contributed to the modern practices of case management.
* Explain how the case manager performs the following case management functions: a) assessment, b) planning, c) intervention, d) monitoring, e) evaluation.

Relationships, knowledge of discipline, methodologies (upper-level):

* Summarize the advantages and disadvantages of becoming an independent case manager.

**Advocacy**

Facts, definitions, concepts (lower-level):

* What is the role of advocate as performed by a case manager?
* Describe some of the specific situations in which a case manager would function as advocate.
* What are intensive case managers and what types of clients require their services?
* Explain the laws governing: a) patients’ rights, b) patient entitlements, c) fair treatment under the law.

Relationships, knowledge of discipline, methodologies (upper-level):

* Discuss the process by which a case manager would determine the appropriate strategy for resolution of client issues.
* Describe the criteria by which a case manager would evaluate the outcome of the resolution strategies.
* Explain how a case manager can use advocacy to impact public policies.

**Linking/Referral**

Facts, definitions, concepts (lower-level):

* To what specific services might a case manager link a client?
* How does the case manager assess a client’s need for additional services?How does the case manager access available referral service within a particular community?
* Summarize the roles and responsibilities of claims personnel in payor and provider agencies.
* Explain the case manager’s role in the quality assurance and utilization processes.

Relationships, knowledge of discipline, methodologies (upper-level):

* What are the criteria by which a case manager evaluates the effectiveness of his or her referral?
* How does a case manager resolve a conflict between client need and availability of services?
* Explain the best methods and steps the case manager can use to ensure effective communication with multiple agencies/staff when managing a cure.
* Summarize the steps followed to evaluate: a) necessity, b) appropriateness, and c) efficiency in the use of services.

**Crisis Intervention**

Facts, definitions, concepts (lower-level):

* Define crisis intervention.
* Describe some of the specific situations in which a case manager would be called upon to practice crisis intervention.
* Describe effective techniques for dealing with a client in crisis.

Relationships, knowledge of discipline, methodologies (upper-level):

* Explain some of the appropriate steps a case manager would take to follow-up after implementing crisis intervention.
* What are the criteria by which a case manager would evaluate the effectiveness of the intervention?
* Describe some of the strategies a case manager may develop in order to prevent recurrence of crisis for that particular client.

**Individual Service Plan (ISP)**

Facts, definitions, concepts (lower-level):

* Define an ISP.
* Explain the purpose of an ISP.
* Describe the process of devising an ISP.
* Explain some techniques used to facilitate client empowerment.

Relationships, knowledge of discipline, methodologies (upper-level):

* What are the criteria by which a case manager would evaluate whether the goals of the ISP are being met?
* What strategies would a case manager develop to help clients who are not meeting their goals?
* Given a case description, design a plan that would facilitate the client’s empowerment, and explain how or why it would do so.

**Daily Living Skills Training**

Facts, definitions, concepts (lower-level):

* What are some daily living skills a client might need to develop?
* How does this training fit into the role of a case manager?

Relationships, knowledge of discipline, methodologies (upper-level):

* Describe some strategies a case manager would devise to motivate a client to work consistently on daily living skills.
* Explain the connection between mastering daily living skills and becoming successfully rehabilitated into the community.

**Personal Values and Qualities**

Facts, definitions, concepts (lower-level):

* Describe some of the personal characteristics needed to be an effective case manager.
* State some of the values and ethical concepts that are important to perform this job.

Relationships, knowledge of discipline, methodologies (upper-level):

* Describe how the case manager fits into the agency and into the community as a whole.
* Describe an ethical dilemma a case manager might face and relate how he or she might resolve it.

**Financial Entitlements**

Facts, definitions, concepts (lower-level):

* Describe some of the basic entitlements for which clients need assistance from the case manager.
* Differentiate between Medicare and Medicaid.
* Explain the case manager’s role in helping clients obtain financial entitlements.

Relationships, knowledge of discipline, methodologies (upper-level):

* Describe how a case manager might solve a specific dilemma between a particular client’s needs and the restrictions of the “system.”
* Given a case description, explain how a case manager might advise a subordinate who needs help negotiating the “red tape” surrounding obtaining financial entitlements for a client.