

# Case Management



Judy Woodward, MSN, RN<sup>a,\*</sup>, Eve Rice, MSN, PNP<sup>b</sup>

## KEYWORDS

• Case management • Disease management • Health care quality • Standards of care

## KEY POINTS

- The current health care system is fragmented, and case management will be on the front line of necessary change.
- Case management will be an expanded role in the Affordable Care Act initiatives.
- The discipline of case management has standards of practice and credentialing for practice, and is not restricted to one profession.
- Case management has been proved to affect the outcomes of health care.

## INTRODUCTION

The future of health care is at a critical point in the United States. The 2001 Institute of Medicine report *Crossing the Quality Chasm* recommended the need for restructuring our current health care system to bring about improvements in safety, effectiveness, patient-centeredness, timeliness, efficiency, and equity.<sup>1</sup> The report further described our care delivery system as fragmented and frustrating for both clients and providers.<sup>1</sup> We have the opportunity to implement change that can bring more quality to patient care, and therefore increase the quality of the lives of our patients.

As we focus more on the specific outcomes and efficiency of health care, one thing becomes very clear: the renewed interest in case management as a strategy to address fragmentation in health care delivery has put it on the front line.<sup>2,3</sup> Case management has been proved to reduce both the length of stay for clients and emergency department (ED) utilization.<sup>3-7</sup> In one study of the use of community-based nurse care-coordination intervention with 57 Medicare clients, monthly Medicare costs were lowered by \$686.<sup>5</sup> In another study with the use of community-based nurse case managers, ED encounters were lowered by 29%, inpatient encounters were lowered by 28%, and overnight inpatient days in hospital were lowered by 37%.<sup>4</sup> In the same study, readmission rates were decreased from 70% to 51% over a 3-year period, and 97% of clients had established a relationship with a primary care provider (PCP).<sup>4</sup> In an integrative review of 18 scholarly articles published between 2000 and

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<sup>a</sup> Department of Health, Andrew Johnson Tower, 710 James Robertson Parkway, Nashville, TN 37243, USA; <sup>b</sup> School of Nursing, Austin Peay State University, PO Box 4658, Clarksville, TN 37044, USA

\* Corresponding author.

E-mail address: [Judy.Woodward@tn.gov](mailto:Judy.Woodward@tn.gov)

2013 on nurse-led community-based case management, Joo and Huber<sup>8</sup> concluded that community-based case management is effective in providing quality, patient-centered care, and stated that these benefits should be communicated to health leaders.

Historically our health care system has been reactive instead of proactive in addressing concerns, but all of this is changing today largely because of the Patient Protection and Affordable Care Act, hereafter referred to as the Affordable Care Act (ACA).<sup>9</sup> Case management will become more integral and crucial as structural changes in health care occur.

Case management is not a new idea. In fact case management has been documented in various forms in the United States from the early 1900s, and has strong roots in community and public health.<sup>10,11</sup> In the 1980s the Prospective Payment System was introduced, and case management became widespread and essential to the entire continuum of health care.<sup>11</sup> The Case Management Society of America (CMSA) was founded in 1990, and established the first Standards of Practice for Case Management in 1995.<sup>12</sup>

## DEFINITION OF CASE MANAGEMENT

Case management is not a profession, but a fluid and dynamic practice that involves many disciplines and continues to evolve.<sup>13</sup> In fact, the case for moving case management to the advanced practice role is being explored in the nursing profession.<sup>4,13</sup> Although social workers and other health care professionals can become case managers, most case managers are nurses.<sup>11</sup> It is essential that case managers follow their own Practice Act for their state of residence.<sup>11</sup> CMSA supports all of the different disciplines involved in case management, and does not focus on either nursing or social work. Case management translates very easily to nursing for several reasons. A key concept for the practice of case management is the holistic focus on the individual, and this is a fundamental teaching in the nursing discipline.<sup>11</sup> The CMSA defines case management as “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.”<sup>12(p6)</sup> Nurses will quickly recognize the nursing process in this definition of case management. Case management actually parallels the nursing process, and demonstrated later in this article.<sup>14</sup> The American Nurses Credentialing Center expands the CMSA definition: in addition, the case managers “actively participate with their clients to identify and facilitate options and services, providing and coordinating comprehensive care to meet patient/client health needs, with the goal of decreasing fragmentation and duplication of care, and enhancing quality, cost-effective clinical outcomes.”<sup>14(p124)</sup> Many organizations have their own definitions of case management, including the National Association of Social Workers, the American Board for Occupational Health Nurses, and the Association of Rehabilitation Nurses.<sup>11</sup>

## CURRENT ISSUES RELATED TO CASE MANAGEMENT

### *The Affordable Care Act and Case Management*

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Today the current emphasis on both quality outcomes and efficiency in health care is the platform for the ACA, and several parts of the reform legislation affect case management. Case management has always sought to defragment the health care system for clients, and some new provisions of the ACA give care coordination a very prominent role as the central focus of both the medical home model and Accountable Care Organizations (ACOs).<sup>15</sup> The Department of Health and Human Services

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