



Contents lists available at ScienceDirect

Journal of Interprofessional Education & Practice

journal homepage: <http://www.jieponline.com>

Formal interprofessional education needed to prepare professional case managers of the future



A B S T R A C T

Demands for greater accountability and transparency in health care are increasing the visibility of professional case managers, including to fulfill the crucial care coordination role. While the competency of professional case managers can be assured through board certification, there is a growing need for preparation of case managers as they transition into the practice. This concern is also highlighted by recent research in the case management field, in which 89% of respondents said they use on-the-job training as their primary method to learn case management. Given the interdisciplinary nature of case management, there is a greater need to address how health and human services professionals are prepared for the advanced practice of case management. With few formal education programs in case management, greater dialogue and cooperation among interprofessional educators and case management leaders are needed to ensure a robust case management workforce development pipeline is established, with more professionals from multiple disciplines entering at earlier stages in their careers.

© 2017 Elsevier Inc. All rights reserved.

1. Introduction

In today's era of increased expectations for accountability and transparency in health care delivery, greater emphasis is being placed on patient-centered care. Case management, care coordination, and care transitions are seen as vital strategies necessary to achieve desired outcomes. As a result of these escalating demands, professional case managers are in the spotlight as key members of interdisciplinary teams in acute, sub-acute, primary care/accountable care organizations, and other care delivery settings. Professional case managers are not only responsible for care management and care coordination, but increasingly are tasked with quality measurement and evaluation of systems of care and their impact on the individual.^{19,21}

As more tasks and responsibilities are placed on case managers, two very important issues are being raised, as will be discussed in this article. The first is how today's professional case managers, who come from a variety of health and human services disciplines, have been prepared for such demanding and complex roles. Based on the recent case management role and function study, conducted by the Commission for Case Manager Certification (CCMC)⁹; the norm for the vast majority of professional case managers in practice today (89% of study respondents) has been to learn on the job.²⁰ While the competency of professional case managers can be assured through board certification, such as attainment of the Certified Case Manager[®] (CCM) credential, there is a growing need for preparation of case managers as they transition into the practice.

The second issue is the maturing of the current case manager population. In the CCMC field survey, case managers aged 51 to

55 accounted for about 22% of respondents, and nearly 25% were aged 56 to 60.¹⁹ With nearly half of respondents of the survey (results of which were found to be representative of the field) over the age of 50, there is a clear need for the profession to address workforce development. This need is further illustrated by the fact that only 1.2% of respondents were 25–30 years old, and those 21 to 40 made up another 8.8%, indicating that case management is more commonly entered into later in a professional's career. If case managers learn primarily on the job, how will the professionals of the future be prepared? As experienced case managers retire, who will provide and support on-the-job training, supervision, and mentoring for new entrants? How can this education gap be addressed?

The answers lie in greater cooperation between interprofessional educators and case management leaders to promote the development of curricula that introduce case management practice to professionals from multiple disciplines. Fortunately, educators and case management professionals have begun to engage in such discussions. Guiding and informing such discussions are field research findings, such as the CCMC role and function study, with its in-depth data and analysis of current case management practice.

2. Case management defined – the role and function study

Case management is defined as a professional and collaborative process of assessing, planning, implementing, coordinating, monitoring, and evaluating the options and services required to meet an individual's health needs.^{7,9} Although the professionals administering case management services may be known by various

titles—including case manager, care manager, or care coordinator, among others—there is a decided emphasis in the practice on care management and care coordination.

It is also important to understand the professional diversity in case management, both in terms of practice setting and background. In the CCMC role and function study, 88.78% of respondents have a nursing background, 5.84% social work, 2.27% vocational rehabilitation, 1.13% counseling, 0.63% therapy (occupational, physical, and respiratory), and 1.35% other backgrounds.¹⁹ While nursing remains the dominant professional discipline, social workers now account for a larger percentage of case managers, compared to only 1.6% in 2010.¹⁸ At the same time, the overall number of certified case managers (CCMs) has also increased. Today, there are more than 40,000 CCMs in practice, compared to approximately 30,000 in 2011. Since 1992, nearly 60,000 case managers have earned the CCM credential.

As a collaborative practice, case management benefits from diversity in professional backgrounds, as teams of health and human services professionals are increasingly being engaged. These teams are known by different names; one of the most frequently used is the interdisciplinary team, in which different disciplines interact to reach a common goal, with each professional contributing his/her expertise. Greater collaboration across health disciplines, including physicians, nurses, social workers, physician assistants, pharmacists, and others is considered “a hallmark of the transformed health system”¹² (p. 2). Case managers often act as the “hub” of such collaborate teams, ensuring a flow and sharing of information among various members.

The need to work in interdisciplinary teams is recognized by several organizations, including by those that set the educational standards for their professional programs. For example, the Council on Social Work Education¹¹; which outlines the required standards for social work education at the baccalaureate and master's level, states: “Specialized practitioners synthesize and employ a broad range of interdisciplinary and multidisciplinary knowledge and skills based on scientific inquiry and best practices, and consistent with social work values. Specialized practitioners engage in and conduct research to inform and improve practice, policy, and service delivery” (2015, p.12). The National Association of Social Workers (NASW)¹⁵; in its Standards for Social Work Case Management, also makes it clear that interdisciplinary collaboration is vital. Standard 8, which is devoted to interdisciplinary and interorganizational collaboration, states: “The social work case manager shall promote collaboration among colleagues and organizations to enhance service delivery and facilitate client goal attainment”¹⁵ (p.5). The American Association of Colleges of Nursing (AACN) delineates the educational framework and expectations of graduates of baccalaureate nursing programs. “Nurses are members of healthcare teams, composed of professional and other personnel that deliver treatment and services in complex, evolving healthcare systems”²; p.9). In addition, advanced practice nurses are expected not only to participate in interprofessional teams, but also to build and facilitate interdisciplinary teams when appropriate.^{3,4}

As members of interdisciplinary teams, case managers from various disciplines are empowered to pursue the “triple aims” in health care. These goals are defined as improving the experience of care, achieving better health of individuals and populations, and reducing the per capita cost of care.⁶ The health care system increasingly looks to case managers to measure and evaluate quality and outcomes of not only case management interventions, but also the care provided by the team—specifically, the quality and outcomes of care delivery systems and their impact on the individual's experience of care., including reduced hospital readmissions.⁸

3. Education of case managers

Complex and increasing demands are fulfilled by case managers today. For example, comparative effectiveness research has demonstrated the value of case managers performing care coordination functions such as providing resource utilization and helping patients navigate health care services. Case managers' clinical functions include medical management and reconciliation, disease-oriented assessment and monitoring, and patient education. In addition, certified case managers in particular were found to follow standards of practice that include evidence-based decision making to guide clinical and patient management.¹⁴ The breadth of case management practice and increased expectations for achieving desired outcomes²¹ place even greater importance on the preparation of these practitioners.

It is imperative to consider each practitioner's background and credentials, including education, experience, and certification to attest to competency. The CCMC role and function study revealed that 70.3% of those surveyed held a bachelor's degree or higher (44.4% bachelor's degree, 24.8% master's degree, and 1.1% doctorate), while 20.7% held associate degrees and 9.0% a nursing diploma.¹⁹ These data attest to the professionalism of the case management field. Yet, despite the majority of case managers having a bachelor's degree, training of professionals who assume the role remains a challenge. The vast majority of case managers (89% of respondents in the role and function survey) use on-the-job training as their primary method to learn case management. Another 6.4% of respondents relied on conferences and seminars, with far small percentages using formal programs and other means.²⁰

The need for formalized training and education of future case managers is further highlighted by two sets of demographic data—one illustrating case management demand, and the other case management supply. On the demand side, the U.S. population is aging, with those aged 65 and older projected to double in number between 2012 and 2050.¹⁶ In addition, more previously uninsured people are entering the system,¹³ which is increasing the number of individuals with complex health conditions who typically benefit from case management services. Without more educational programs to specifically address case management, such as part of undergraduate and graduate programs for nursing and social work, pressure may be placed on the system.

The lack of formal academic preparation for case managers, per se, is reflective of limited school or university-based programs. Treiger and Fink-Samnick²² reported the availability of only six such programs in the U.S., two of which are offered online. Without formal academic programs to prepare them, individual case managers must avail themselves of certain experiences on the job in order to become qualified in the field and pursue certification, which is increasingly being required by employers. Among the case manager respondents to the CCMC role and function survey, 40% said their employers now require certification, an increase from about 36% in the 2009 role and function survey. In addition, monetary reward (e.g., compensation) is offered by 30% of employers, compared to about 27% in the 2009 survey.¹⁹ To meet this demand, more educational and professional pathways must be established.

The continually changing landscape of healthcare, the call to improve the patient care experience, and the well-documented challenges professionals face to coordinate patient care highlights the need to provide more in-depth case management curricula^{1,5,23}. Curricula provides health care professionals a foundation for practice, which is enhanced through experience. The content of such interprofessional education can be guided by insights into current, relevant case management practice,

Download English Version:

<https://daneshyari.com/en/article/5569417>

Download Persian Version:

<https://daneshyari.com/article/5569417>

[Daneshyari.com](https://daneshyari.com)