Case management services are provided by healthcare professionals working with people to identify issues and barriers that may prevent them from getting better and uncovering mutually agreed upon solutions to achieve their healthcare goals.

Case managers work with individuals and families to understand their illness or injury, what the individual/family needs to do to participate with the clinical team, follow the treatment plan and the path to reaching the best possible outcomes.

What Kind of Work Does a Case Manager Do?

Although case managers work in a lot of environments, some common elements include:

**Assessment**, which is the process of identification of the condition/needs, abilities and preferences of the individual, which leads to the development of a plan of care.

**Care planning**, which is a kind of health care map, including goals and preferences. The care plan defines strategies and next steps towards achieving the desired outcomes. The ultimate goal is to help individuals take control of their care and be actively involved in evaluating the experience.

**Alignment**, which means case managers work to align all the moving parts and puts the plan into action with the individual.

**Evaluation/Outcomes Measurement**, which tells the individual and case manager what’s working, what’s not working and what needs to be modified (plan, goals, etc.). Finally, it identifies what progress is being/has been made toward individual goals.

**Promotes Client Self-Determination**, which means the individual learns the skills necessary to take control of their care with confidence. In other words, they know what’s wrong with them, what they need to do about it, and the value of doing so.

DOWNLOADABLE RESOURCES

- Case Management Competency Map
- Case Management Lexicon
- Case Management Intensity Grid
Who Can Be a Case Manager?

Case managers are licensed health care professionals who provide the following services:

• Assessment  
• Planning  
• Assistance in initiating the plan  
• Evaluation of the plan  
• Client self-determination

These individuals include:

• Licensed Registered Nurses (RN)  
• Licensed social worker  
• Vocational counselor

But, would not include:

• Licensed Practical Nurses (LPN)  
• Individuals providing services in the judicial system  
• Community services professionals working with developmental disabilities.

Where Does a Case Manager Work?

Case managers extend across all health care settings. However, the practice varies in degrees of complexity and comprehensiveness based on four factors:

1. The professional discipline of the practitioner (nurse, social worker, physician, rehabilitation counselor)
2. The context of the care setting, from wellness and prevention on one end of the spectrum to acute care or rehabilitation on the other extreme.
3. The health condition and needs of those being served (critical care vs. diabetes, for example)
4. The reimbursement source

The following list provides a general representation of the settings in which case manager’s work:

• Hospitals  
• Ambulatory care clinics and community based organizations  
• Private corporations  
• Insurance programs  
• Government sponsored programs  
• Provider agencies and community facilities  
• Geriatric services including residential and assisted living  
• Long-term care services, including home and community based services  
• Hospice, palliative and respite care  
• Physician and medical group practices