

DFW Case Notes

in this issue

- :: President's Message
- :: Notes from the President Elect
- :: FROM MY CORNER
- :: Standards of Practice for Case Management

President's Message

Cathy Campbell, RN-BSN, CHC, MBA, FACHE



We have had some very HOT days, but soon we will be in September and our first dinner meeting will be set the third Tuesday of each month. I hope all of you have had a restful enjoyable summer.

You may have noticed on the dates to watch, an "On the Road" seminar was scheduled in Waco in July. In a business decision, the seminar was cancelled. However, the SPC will continue to seek opportunities for sponsoring "On the Road" seminars in the future. I believe it is my responsibility to keep you apprised of our chapter activities.

I believe we have an exciting year ahead of us. Your Board of Director's efforts are focused on providing educational presentations that can be used in your everyday practice. If there are specific speakers or subjects you wish to be considered, please give the information to one of your board members for consideration. This year we are evaluating presentation objectives and content before scheduling. We believe we can better meet the chapter educational needs with pre-review of content.

All plans for the SPC sponsored Fall seminar, "A

FROM MY CORNER

BK Kizziar, Executive Director



BIG NEWS!!

The new Chapter website is up and running and ready for you to browse. It has much more information than the previous site and an exclusive MEMBER'S ONLY page. Almost a year went into making this a site that would be informative, easy to use and a resource to members and non-members alike. So here is your "User's Guide" to the new and improved DFW Chapter of CMSA website!

dfwcmsa.org

Home Page

The Home Page provides information about CMSA and contact information for the Executive Director, National CMSA and our Meeting Planner.

Board of Directors Page

This page offers an up close and personal look at your Chapter's officers and Board members and their term of office.

Chapter Committees Tab

All Chapter committees are listed here including the purpose of each. Those interested in knowing more about a specific committee will see a contact person listed.

"Change of Seasons" are organized complete and set for October 2010. I believe all will be pleased with the educational content; RAC and MAC is one topic included. Content brochures will be distributed as soon as available.

Don't forget to sign-up and listen to the free webinar presented by our national www.CMSA.org.

Join us for a Webinar on August 10

This free webinar will highlight the major findings from the "2010 Health Information Technology Survey," which was distributed last spring to about 15,000 health care professionals. The hour-long session will examine how emerging information technology (IT) applications are impacting the practice of care management and will highlight several noteworthy trends, including:

- Reporting on IT functions offered by care management software systems, including automated workflows
- Reviewing interoperability and integration interfaces
- Identifying existing and future communication links
- Assessing several key elements associated with nurse triage solutions
- Highlighting data reporting and predictive modeling capabilities
- Reviewing user satisfaction ratings of care management software, electronic medical record (EMR), and nurse triage systems
- Exploring case manager caseload tracking of consumer and provider access to health information
- Discussing respondents' attitudes on the value of health IT systems

I believe the above objectives will provide important information for our professional practice. I encourage you to spend this short period of time acquiring important information. Go to www.CMSA.org.

See you at the September 21, 2010 Dinner Meeting. Please note - that anyone who has made a reservation and does not cancel prior to the cut-off date/time, will be invoiced the cost of the dinner meeting plus a processing fee. This additional fee includes members and non-members. Thank you for your understanding and cooperation.

Membership Page

The advantages of joining National and DFW CMSA are found on this page as well as a list of all the resources received with membership. Membership information is included with the ability to download a membership brochure or go directly to the National CMSA website. Anyone interested in receiving Chapter newsletters and BLASTs may complete an interest form and be added to the distribution list.

Chapter Events Page

Every regular Chapter event is listed here with a link to learn more about each one individually.

· Dinner meeting Tab

Information specific to the next month's dinner meeting may be found here. Registration for the dinner meetings can be done by clicking on the Reservation tab to the left. A word of caution! Do not put this in the "Favorites" section of your computer. It may not refresh when new meetings are posted and your reservation may not be received.

· Annual Conference Tab

Currently, the 2011 "Case Managers: Super Heroes of Healthcare Reform" Exhibitor and Sponsorship information is available on this page. As the planning for the 2011 conference is underway, when details are finalized in a few short weeks, viewers will see the conference attendee information and may download the registration brochure directly from this page.

· Fall Seminar Tab

The upcoming Fall Seminar, sponsored by the Strategic Planning Committee, is listed here. "A Season of Change; The New Case Management Landscape" has links for Exhibitors and Sponsors as well as the attendee brochure.

· Taking it on the Road Seminar Tab

This tab will provide information for any upcoming Strategic Planning Committee sponsored seminars out of the DFW area. It also has contact information for anyone interested in hosting a Taking it on the Road event.

· CCM Prep Class Tab

Any scheduled prep classes will be posted on this page. Currently, the all day class that will held in conjunction with the Fall Seminar is listed as well as the class that will precede the Annual Educational Conference in March 2010.

Chapter Newsletter Page

Mark your Calendars:

- o 9/21/10 First Dinner Meeting
- o 10/10/10 Case Management Week
- o 10/19/10 Prep Class / Dinner Meeting
- o 10/20/10 Fall Seminar
- o 11/16/10 Dinner Meeting
- o 12/14/10 Dinner Meeting

Members - National has requested that each chapter have 2 liaisons on the public policy committee. Please submit your interest to me at the September Dinner Meeting. I have a PP Guidelines to assist in your role as a liaison. Thanks in advance for your contribution to this endeavor.

See the announcement of the new DFW CMSA Website in the Executive Director's Column.

SEE YOU IN SEPTEMBER AND BE SAFE !

Notes from the President Elect

*Kathy Kucera, PhD, RN,
CCM*



As I sit down to write the next installment of this review of the 2010 Standards of Practice for Case Management (SOP), I recall some of the feedback I have received on the past columns. While most of it has been complimentary, it was also suggested I try to make this column a little less dry and a little less boring! While I admit I really can appreciate that, I am at a loss as to how to change this review. No matter how interesting the SOP are, I have not found one good "cliff-hanger" in anything that I have read!

When reviewing the differences between the 2002 and the 2010 SOP, I had decided not to use too much of my own language or examples for fear I might change the intent of the Standard. So for now, this column will continue to highlight each 2010 SOP and how it is to be demonstrated by the case manager. I realize that for many of you the 2010 SOP may not present anything different from how you currently practice and demonstrate case management (CM). However, the 2010 SOP will still make it easier for you to review your CM practice and to assess if you are meeting the Standards or not. The SOP will also assist you

The current Chapter newsletter may be viewed on this page. As well, newsletters from previous months will be archived and available for download by clicking on the Archived Newsletters tab.

Scholarships and Awards

All awards and scholarship information is available here.

- Melba Fritz Scholarship Award Tab

This scholarship is funded by donations collected at each dinner meeting and provides reimbursement for the cost of taking the national Case Management Certification (CCM) examination given by the Commission on Case Management Certification. A link to the Commission website is listed as is the ability to download the application form and contact person information.

- Case Manager of the Year Award Tab

Here you will see information about the CMOY award. The criteria is also available for download.

- Award of Service Excellence Tab

2010 was the first year for this honor to be awarded. View this page for information about the AOSE award and download the criteria.

- Lifetime Achievement in Case Management Award Tab

New to DFW CMSA but having been presented at the national CMSA level several times, the Lifetime Achievement award recognizes those who have gone above and beyond in their dedication not only to the practice of case management but also demonstrated the highest level of leadership and contributions to the DFW Chapter of CMSA.

Career Resource Center Page

Whether seeking a position in case management or hiring case managers, this is the page for you. Just click on the "Seeking" or "Available" tab to see what is offered.

- Professional Development Tab

The short articles seen here will provide information helpful in expanding your professional development. The articles will change frequently so check out this tab regularly.

Industry Partners Page

What a deal! For as little as \$1 a day, your company's logo will appear on this page with a direct link to your company website. As an Industry Partner your company will also be able

in implementing any needed changes in the way you practice CM. I still encourage each CM to review the complete SOP booklet from National CMSA to enhance their practice of CM.

I also continue to ask for your help in this review of the 2010 SOP. I truly welcome your feedback and any suggestions you may have on how to present this important information in a more interesting format. It will enhance the implementation of the 2010 SOP for all of us!

Standards of Practice for Case Management Review Part 4

In the July Newsletter, the following Standards of Case Management Practice were reviewed:

- A. Client Selection Process for Case Management
- B. Client Assessment
- C. Problem/Opportunity Identification
- D. Planning

This column will highlight the Standards of Monitoring, Outcomes and Termination of Case Management Services. Again, these 2010 SOP are not that different from the 2002 Standards. However, the 2010 SOP does continue to state how each Standard is to be demonstrated by the CM.

E. Monitoring

The case manager should employ ongoing assessment and documentation to measure the client's response to the plan of care.

Demonstrated By:

- Documentation of ongoing collaboration with the client, family or caregiver, providers, and other pertinent stakeholders, so that the client's response to interventions is reviewed and incorporated into the plan of care.
- Verification that the plan of care continues to be appropriate, understood, accepted by client and support system, and documented.
- Awareness of circumstances necessitating revisions to the plan of care, such as changes in the client's condition, lack of response to the care plan, preference changes, transitions across settings, and barriers to care and services.
- Collaboration with the client, providers, and other pertinent stakeholders regarding any revisions to the plan of care.

to post job openings and information about your company that case managers need to know.

Chapter History Page

How can we know where we're going if we don't know where we've been? This page gives information about your Chapter that you may not know. It is here that you will also find the Chapter's Mission & Vision statements.

MEMBERS ONLY Page

As a member of DFW CMSA you will have exclusive access to important information about your Chapter. Obtain your User Name and Password today to access these important tabs:

- Board of Director Meeting Schedule
- Chapter Bylaws
- Chapter Policies and Procedures
- Business Meeting Overview (the Cliff Notes of Board meetings)
- Read All About It! Important information every member needs to know.
- Standards of Practice

So, here you have it. The new DFW CMSA website. We're anxious for you to browse the site and provide feedback. Many, many hours went in to the development of this new site. We want it to be a tool that you will use over and over again. What do you think?

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Standards of Practice for Case Management

Continued...

G. Termination of Case Management Services

The case manager should appropriately terminate case management services based upon established case closure guidelines. These guidelines may differ in various case management practice settings.

Demonstrated By:

- Identification of reasons for case management termination, such as:
 - o Achievement of targeted outcomes or maximum benefit reached
 - o Change of health setting
 - o Loss or change in benefits (i.e., client no longer meets program or benefit eligibility requirements)
 - o Client refuses further medical/psychosocial

F. Outcomes

The case manager should maximize the client's health, wellness, safety, adaptation, and self-care through quality case management, client satisfaction, and cost-efficiency.

Demonstrated By:

- Evaluation of the extent to which the goals documented in the plan of care have been achieved.
- Demonstration of the efficacy, quality, and cost-effectiveness of the case manager's interventions in achieving the goals documented in the plan of care.
- Measurement and reporting of the impact of the plan of care.
- Utilization of adherence guidelines, standardized tools and proven processes. These can be used to measure individuals' preference for, and understanding of:
 - o The proposed plans for their care
 - o Their willingness to change
 - o Their support to maintain health behavior change
- Utilization of evidence-based guidelines in appropriate client populations.
- Evaluation of client satisfaction with case management.

continued in second column

services

o Client refuses further case management services

o Determination by the case manager that he/she is no longer able to perform or provide appropriate case management services (e.g., non-adherence of client to plan of care)

o Death of the client

· Evidence of agreement of termination of case management services by the client, family or caregiver, payer, case manager, and/or other appropriate parties.

· Documentation of reasonable notice of termination of case management services that is based upon the facts and circumstances of each individual case.

· Documentation of both verbal and/or written notice of termination of case management services to the client and to all treating and direct service providers.

· With permission, communication of client information to transition providers to maximize positive outcomes.

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