

CASE MANAGEMENT

POLICY:

Interfaith House Medical Case Management is a proactive case management model intended to serve persons living with multiple complex medical and/or adherence health-related needs. The model is designed to serve individuals who may require assistance with access, utilization, retention and adherence to primary health care services. Medical Case management clients need ongoing support from case management to actively engage in medical care, and continued adherence to treatment.

Medical case management services are a range of client-centered services that link clients with health care, psychosocial, and other services. These services ensure timely and coordinated access to medically appropriate levels of health and support services and continuity of care, through ongoing assessment of the client's needs and personal support systems. Medical case management services will be culturally, and linguistically appropriate to the target populations served. Medical case management may be delivered face-to-face, via telephone, or utilizing other forms of communication appropriate for the client. A primary goal of Medical case management is to assist the clients in moving toward empowerment, self-determination, and self-sufficiency. This allows the case manager to transition clients to more appropriate programs and services as the client's medical and psychosocial status improves, freeing valuable resources for people who are most in need.

A “**service unit**” of medical case management is defined as a visit or encounter lasting 15 minutes or longer, either face to face or by telephone.

Key activities:

- Intake and eligibility determination
- Assessment and reassessment
- Service Plan development
- Implementing and monitoring the Service Plan
- Coordination
- Adherence Planning
- Active referral and follow up
- Transition and case closure
- Records management
- Case load management

At a minimum, medical case management must include the following;

- Provision of treatment adherence counseling to ensure readiness for, and adherence to, complex treatments.
- Coordination and follow-up of medical treatments
- Client-specific advocacy and/or review of utilization of services
- Motivating and assisting clients to access long-term support for health care costs, including Medicaid, Medicare, COBRA, and pre-existing condition insurance plans.

Implementing and Monitoring

Purpose: The provision of Medical Case Management should be consistent with the Service Plan. Monitoring occurs to ensure that provided services are consistent with an individual Service Plan, and are evaluated. Monitoring is an ongoing data collection process. The frequency of monitoring is dependent on the level and intensity of client need.

Standard: Clients should receive Medical Case Management that is suited to their situation. Medical Case Management should be relevant to the client's current situation, provide active referrals, advocacy and interventions based on the Service Plan, determine the need for treatment plan revision, maintain ongoing client contact, and evaluate the level of client satisfaction.

Criteria: The Service Plan should be consistent with needs identified in the comprehensive client assessment. The strategy or plan of action should be consistent with the updated Service Plan including:

- Assistance in arranging services, making appointments, and confirming service delivery dates;
- Encouragement to client to carry out tasks they agreed to;
- Support to enable clients to overcome barriers and access services;
- Negotiation and advocacy as needed;
- Other case management activities as needed.

Monitoring involves carrying out of tasks listed in the Service Plan, including the following activities:

- Provider contact in person, by phone, or in writing;
- Conducting ongoing monitoring and follow-up with clients and providers to confirm completion of referrals, service acquisition, maintenance of services and adherence to medical care;
- Actively following-up on established goals in the Service Plan to evaluate client progress and determine appropriateness of services;
- Assisting clients in resolving any barriers to completing goals in the Service Plan