Making the Case for Social Work Case Management

Case Management Basics

Case management has many different definitions and is called different things including care coordination and discharge planning. Case management services exist in many different settings but are most commonly found in medical settings such as hospitals, home health and hospice agencies; through state funded programs for children and adults with chronic health or mental health conditions; in schools; and in local community agencies. These services are provided by a variety of professional and para-professional case managers. Primarily, however, they are provided by nurses and social workers.

Over the past twenty to thirty years, case management services have evolved extensively. Case management is a term being used to describe services ranging from the most basic to comprehensive. Some examples follow:

- **Utilization review** activities are sometimes described as case management. These activities may include a review of paid claims or medical payments to determine if the person is “over-utilizing” insurance coverage. These type services often do not include any contact with the person or patient.
- **Phone and/or online contacts** with clients are a type of case management. These types include disease management models in which a health care professional follows up with patients to assure proper care and management of conditions such as diabetes or hypertension.
- **Discharge planning** services are offered in most hospital settings and are sometimes referred to as case management. These services are time limited and the focus is meeting the patient’s needs after being discharged from a hospital setting. Services may include helping clients obtain health insurance coverage of some type, assuring medication and medical equipment needs are met and helping families make decisions surrounding care of loved ones.
- **Comprehensive case management** services are those in which a case managers assesses a wide range of potential needs with a family, coordinates services with others involved with a client’s care and advocates for client needs to be met.

Comprehensive Case Management

Comprehensive case management will be the focus of this document since it is most closely in line with the philosophy and training of social workers. According to the National Association of Social Workers (NASW), “.....case management is a method of providing services whereby a professional social worker assesses the needs of the client and the client’s family, when appropriate, and arrange, coordinates, monitors, evaluates, and advocates for a package of multiple services to meet the specific client’s complex needs.”

Comprehensive case managers assess for a wide range of needs of clients and families including:

- Health needs, including mental health issues
- Educational or vocational needs
- Basic needs such as housing and food assistance
- Transportation issues
Other issues as defined by families

Comprehensive case managers also assess the strengths of the families they work with including the role of natural helping networks, personal strengths and accomplishments and other supports such as supports of a client’s community of faith. This comprehensive case management may be structured around a certain client population, such as children with health conditions, but services and assessment of needs are not limited by that structure. Needs are identified by families and services are individualized to meet those needs. In this way, comprehensive case managers paint a complex picture of families instead of fitting families into an established box of available services and anticipated needs.

Comprehensive case management services do include referrals to resources to meet needs but services go beyond simply giving clients phone numbers and contact information for those resources. Case managers:

- Coordinate extensively with resources and service providers such as physicians to assure clients needs are being met
- Advocate for clients needs when problems are encountered
- Advocate for new services when client’s needs cannot be met by currently available resources
- Advocate for changes in local, state and national policy when needed to address needs of clients

Comprehensive case management also includes a teaching role. Clients are taught how to navigate complex systems in such areas as health care and education so clients learn how to become their own case managers in the future. Comprehensive case managers strive for clients managing without assistance after services are complete.

**Social Workers as Effective Case Managers**

Social workers are uniquely qualified to be case managers. Social work roots are grounded in case management activities such as linking clients to the services they need and advocacy for the disadvantaged. Social workers come from a system focus in which clients are assessed in their environment. The consideration of environmental factors and the impact of forces outside the client as an individual is a fundamental principle of comprehensive case management.

Social workers are trained to intervene at multiple levels to meet client needs, this includes advocating on community, state and national levels for needed changes. Ultimately, social work case managers seek to alleviate the complexity and problems in systems that make case management necessary.

Social work education focuses heavily on strengths based perspectives and social workers use client strengths in interventions to assure positive client outcomes.

**Case Management Benefits**

Case management can have many benefits dependent on the quality of services being provided. Benefits include:
- Increased access to needed health, educational and other services
- Greater compliance with medical and other appointments
- Improved communication between health care providers
- Increased health insurance coverage for clients with case managers
- Decreased cost associated with some case management programs (primarily due to hospital admissions)

Case management services can be life changing for clients who are struggling to navigate sometimes complex and de-humanizing systems. Case managers can give clients:

- Needed support and a person to turn to when in crisis
- Education about the issues faced by clients with chronic health or mental health conditions
- An advocate when systems do not function optimally

Social workers, due in part to their education, disciplinary philosophy and code of ethics, are well suited to the case management roles and requirements. They have proven themselves to be able to operate both independently on behalf of their clients as well as a part of a clinical team. While nurses and other professionals are able to perform some case management functions, social workers are able to provide comprehensive services to address the needs of the whole person in his/her environment to achieve healthy client outcomes.
References


