School: ATEC – Stakeholders
Course: Why Case Management Matters
Faculty: Mollie Kallen, VP of Business Development, the IMA Group

Summary

The course "Why Case Management Matters," taught by Mollie Kallen of the IMA Group, explores the vital role of case management in the workers' compensation industry, emphasizing its historical development, current practices, and future directions.

Historical Evolution: Mollie Kallen begins by tracing the history of case management from its roots in the late 1800s and early 1900s. Initially, case management was community-based, involving public health nurses and social workers who assisted people in settlement houses and charity organizations. The Social Security Act of 1935 expanded these services, providing funding for various health care needs. Post-World War II, the involvement of insurance companies marked a significant shift towards more structured and medically-focused case management, particularly aiding returning soldiers.

Modern Developments: The 1960s and 1970s saw further legislative support, such as the Community Mental Health Act of 1963 and the establishment of Medicare and Medicaid. The first formal case management company, INA (now Cigna), was established in 1966, revolutionizing case management with the use of computers and other tools. The 1970s also introduced the concept of medical cost management in workers' compensation, laying the groundwork for modern practices.

Current Practices: In the 1980s and beyond, case management became increasingly focused on workers' compensation and cost containment. The role of case managers expanded to include utilization review, discharge planning, and ensuring compliance with treatment plans. This period also saw the rise of third-party administrators (TPAs) and insurance organizations utilizing case management to minimize risk and costs.

The Role of Case Managers: Case managers today have diverse responsibilities, including telephonic and field case management, vocational case management, and catastrophic case management. Telephonic case management involves coordinating care via phone, suitable for less complex cases. Field case management requires in-person visits to medical appointments, especially for catastrophic injuries. Vocational case managers help injured workers find alternative employment if they cannot return to their previous jobs. Catastrophic case management involves intensive coordination of care for severe injuries, often requiring frequent hospital visits and close interaction with the injured worker's family.

Importance of Communication and Coordination: Effective case management hinges on robust communication and coordination among various stakeholders, including injured workers, employers, medical providers, and insurance companies. Mollie Kallen highlights the importance of roundtable discussions and regular updates to ensure all parties are aligned and working towards the same goals. This collaborative approach helps in managing expectations, reducing legal issues, and improving overall outcomes for injured workers.

Ethical Considerations: Ethics play a crucial role in case management. Case managers must maintain professional boundaries, ensure confidentiality, and avoid giving medical advice. They are responsible for facilitating communication and presenting treatment options without making decisions themselves.

Impact on Injured Workers: Case management significantly benefits injured workers by providing personalized support, helping them navigate the healthcare system, and ensuring they receive appropriate care. This holistic approach considers the injured worker's physical, emotional, and social needs, ultimately aiming to empower them and facilitate a smoother recovery process.

Future Directions: The course concludes with a discussion on the future of case management, emphasizing the need for ongoing education, certification, and adaptation to changing healthcare landscapes. The introduction of telehealth and other technological advancements continues to evolve the field, offering new tools and methods for effective case management.

In summary, Mollie Kallen's course underscores the critical role of case management in the workers' compensation industry, highlighting its historical roots, modern practices, and the ongoing need for ethical, effective communication and coordination to support injured workers.

Learning Objectives

1. Understand the historical development and evolution of case management in the workers' compensation industry.
2. Identify the key roles and responsibilities of case managers in different types of case management.
3. Recognize the importance of stakeholder communication and coordination in effective case management.
4. Analyze the impact of social determinants of health on case management outcomes.

5. Learn the ethical considerations and boundaries that guide the practice of case management.

Primary Takeaways

1. Case management has evolved from a community-based approach to a structured system involving various stakeholders in the workers' compensation industry.
2. Effective case management requires clear communication, coordination, and the ability to adapt to the needs of injured workers and other stakeholders.
3. Social determinants of health significantly influence the outcomes of case management, emphasizing the need for a holistic approach.
4. Ethical guidelines and professional boundaries are crucial for maintaining objectivity and trust in case management.
5. The role of a case manager is multifaceted, involving tasks such as utilization review, discharge planning, and ensuring compliance with treatment plans.

Course Outline

1) Introduction
   a) Instructor Background
   b) Importance of Case Management

2) Historical Development of Case Management
   a) Early Beginnings (Late 1800s - Early 1900s)
      i)   Community-based approach
      ii) Role of public health nurses and social workers
   b) Mid-20th Century Developments
      i)   Social Security Act of 1935
      ii) Post-World War II changes
      iii) Community Mental Health Act of 1963
   c) Case Management in the 1970s
      i)   Role of insurance companies
      ii) Older Americans Act

3) Modern Case Management (1980s - Present)
   a) Shift to Workers' Compensation Focus
      i)   Cost containment
      ii) ROI and accountability
   b) Technological and Legislative Changes
      i)   Introduction of HIPAA

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        ii) Affordable Care Act
   c) Current Trends and Practices
        i) Use of TPAs and insurance organizations
        ii) Telephonic vs. field case management
        iii) Catastrophic case management

4) Roles and Responsibilities of Case Managers
   a) Types of Case Management
        i) Telephonic
        ii) Field
        iii) Vocational
        iv) Catastrophic
   b) Daily Tasks and Coordination
        i) Medical and vocational case management
        ii) Stakeholder communication
        iii) Utilization review and discharge planning

5) Social Determinants of Health
   a) Impact on Case Management
   b) Holistic Approach to Care
   c) Addressing Economic and Social Factors

6) Ethical Considerations
   a) Professional Boundaries
   b) Ethical Guidelines and Training
   c) Maintaining Objectivity

7) Conclusion
   a) Importance of Effective Case Management
   b) Future Directions and Challenges
   c) Final Thoughts and Encouragement

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