

CMSA Standards of Professional Case Management Practice

ABSTRACT:

CMSA's Standards of Practice for Case Management serve as a unifying force for professional case management practice by providing a common understanding and application of the role, process, and expectations. As such, the Standards serve to drive accountability for best practice for individual professional case managers as well as for the organizations within which they work. This course is designed to enhance this understanding by expanding on these common principles to deliver more unified education to professional case managers creating better quality skill sets across the healthcare continuum.

COURSE OBJECTIVES:

- Expand knowledge of the CMSA Standards of Practice for Case Management guidelines and standards.
- Educate on common industry terms how they should be used in the case management profession.
- Demonstrate the use of the standards through case studies.
- Create consistent delivery of case management related services.

STANDARDS OF PRACTICE: <https://cmsa.org/about/standards-of-case-management-practice/>

This program includes 17 Modules that must be completed to complete the program.

#	Module	Download	Read	Participate	Objectives
1	Introduction to the CMSA Standards of Practice for Case Management	•CMSA Standards of Practice, 2022 •Course Overview •Course Access •Introductory slide handout	CMSA Standards of Practice. p. 2-20; Glossary, p. 45-53; Appendices; p. 54-60 narrative text	Presentation Module Quiz	Define case management. Describe the relationship between Philosophy, Guiding Principles, and the Standards of Practice. List the components of the case management process.
A	Qualifications	Qualifications Materials •Narrative •Slide deck handout	Qualifications standard, p. 21-22 Qualifications narrative text	Presentation Vignette Module Quiz	Cite the CMSA qualifications for Case Management. Give examples of licenses and degrees which qualify an individual for Case Management. Evaluate individuals for appropriate demonstration of meeting qualification.

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B	Professional Responsibilities	Professional Responsibilities •Narrative •Slide Deck Handout	Professional Responsibilities standard, p. 22-23 Professional Responsibilities narrative	Presentation Vignette Module Quiz	Define research, research utilization for the case manager. Describe research as an investigative process of systematic inquiry that generates new knowledge. Describe research utilization as the application of new knowledge to the clinical setting to determine how that new knowledge changes patient, system or provider outcomes.
C	Legal	Legal Materials •Narrative •Slide deck handout	Legal standard, p. 23-24 Legal narrative text	Presentation Vignette Module Quiz	Identify sources of legal authority. Associate practice activities/responsibilities with controlling law. Clarify the hierarchy of legal, regulatory and professional obligations.
D	Ethics	Ethics Materials •Narrative •Slide deck handout	Ethics standard, p. 24-25 Ethics narrative text	Presentation 3 Vignettes Module Quiz	Define how ethics and accompanying designated themes are framed in the current case management industry. Identify and demonstrate mastery of case management's five basic ethical principles. Identify and discuss both the distinction and alignment of ethical codes amid administrative regulations and laws.
E	Advocacy	Advocacy Materials •Narrative •Slide deck handout	Advocacy standard, p. 25-26 Advocacy narrative text	Presentation Vignette Module Quiz	Identify key concepts and tools case managers can use to promote the client's right to self-determination. List resources needed for case managers to facilitate client access to necessary and appropriate services. Describe strategies for advocating effectively for expansion or establishment of services and for client-centered changes in organizational and governmental policy.

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F	Cultural Competency	Cultural Competency Materials •Narrative •Slide deck handout	Cultural Competency standard, p. 27 Cultural Competency narrative text	Presentation Vignette Module Quiz	Understands relevant cultural information. Assesses client linguistic needs and identifies resources to enhance proper communication. Pursues education in cultural competence.
G	Resource Management	Resource Management Materials •Narrative •Slide Deck Handout	Resource Management standard, p. 27-28 Resource Management narrative text	Presentation Vignette Module Quiz	Understand the importance of managing resources to maintain cost-effective outcomes. Define the criteria used to assess quality, appropriateness and medical necessity of resources. Identify how the case manager can demonstrate his/her value to the healthcare system.
H	Health Information Technology	Health Information Technology Materials •Narrative •Slide Deck Handout	Health Information Technology standard, p. 28 Health Information Technology narrative	Presentation Module Quiz	Define the impact of Health Information Technology to improve patient care. Review examples of HIT used to store, share, and analyze information. Explore the importance of regulations and legislation necessary to protect information.
I	Client Selection	Client Selection Materials •Narrative •Slide deck handout	Client Selection standard, p. 28-30 Client Selection narrative text	Presentation Vignette Module Quiz	Understand methods necessary to identify individuals who will benefit from case management intervention. Discuss the development of a consistent selection process. Discuss specific criteria and rationale used in client selection.
J	Client Assessment	Client Assessment Materials •Narrative •Slide deck handout	Client Assessment standard, p. 30-34 Client Assessment narrative text	Presentation Vignette Module Quiz	Discuss completion of a comprehensive case management assessment. Understand uses of assessment information. Explore sources and methods of information gathering.

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K	Identifying Care Needs and Opportunities	Identifying Care Needs and Opportunities Materials •Narrative •Slide deck handout	Identifying Care Needs and Opportunities standard, p. 34-35 Narrative text	Presentation Vignette Module Quiz	Discuss how to determine if something is a case management problem/barrier. Discuss obtaining agreement with the client on the challenges to their healthcare. Document a prioritized list of identified problems/barriers and healthcare priorities.
L	Planning	Planning Materials •Narrative •Slide deck handout	Planning standard, p. 36 Planning narrative text	Presentation Vignette Module Quiz	Define the key elements of a Case Management Plan (CMP). Identify the role and function of the interdisciplinary team in developing and executing a CMP as the client moves through the healthcare continuum. Develop a CMP representative of the continuing care needs of the client across and through each transition of care.
M	Facilitation, Coordination, and Collaboration	Facilitation, Coordination, and Collaboration Materials •Narrative •Slide deck handout	Facilitation, Coordination, and Collaboration standard, p. 37-38 Facilitation, Coordination, and Collaboration narrative text	Presentation Vignette Module Quiz	Define the key concepts/skills of facilitation, coordination, and collaboration as they relate to the practice and delivery of effective case management. Discuss the use of these action oriented concepts/skills and their ability to develop and maintain proactive, client-centered relationships to maximize communication with the client and stakeholders toward optimal outcomes. Discuss the legal and regulatory aspects of collaboration and communication as they relate to client privacy and confidentiality.
N	Monitoring	Monitoring Materials •Narrative •Slide deck handout	Monitoring standard, p. 38-39 Monitoring narrative text	Presentation Vignette Module Quiz	Understand the utilization of on-going assessment(s) to evaluate the current status of a client in relation to the case management plan (CMP). Understand the importance of objective documentation of the client response to case management interventions. Understand that all care team members influence the CMP.

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O	Outcomes	Outcomes Materials •Narrative •Slide deck handout	Outcomes standard, p. 39-40 Outcomes narrative text	Presentation Vignette Module Quiz	Define outcomes and how they pertain to case management performance improvement (PI), and quality. Understand how the utilization of adherence guidelines, standardized tools, and or proven processes can be used in case management PI.
P	Case Closure of Professional Case Management Services	Case Closure of Professional CM Services Materials •Narrative •Slide deck handout	Case Closure of Prof CM Srvcs standard, p. 40-42 Case Closure of Prof CM Srvcs narrative text	Presentation Vignette Module Quiz	Define termination of services. Define acceptable reasons for terminating the case manager/client relationship. Identify appropriate actions to take at the time of TOS to prevent abandonment.
	Final Exam & Evaluation			Final Exam - 45 Questions Certificate	