# **Case Management Notes**

Client information	
Name: Marcus Holbrook	Date of birth: 09/22/2988
Contact information: 555-0187, marcus holbrook	@email.com
Emergency contact: Alicia Holbrook (sister), 555	-0192
Case information	
Case ID: CM-2024-0415	Date opened: 04/15/2024
Case manager: Tara Simmons, LCSW	
Purpose of visit:	
Initial assessment for substance abuse treatme	nt referral
Subjective	Objective
- Client reports drinking "about a six-pack a day" for the past 3 years - States he wants to quit but has been unsuccessful on his own - Expresses concern about potential job loss due to decreased performance - Reports feelings of shame and isolation from family	- Appears disheveled and fatigued - Slight hand tremors observed - Oriented to person, place, and time - BAC at time of visit: 0.06
Assessment	Plan
- Alcohol Use Disorder, severe - At risk for alcohol withdrawal - Impaired social and occupational functioning - Motivated for treatment but lacks support system	1.Refer to local intensive outpatient program (IOP) for alcohol abuse 2. Provide information on local AA meetings and encourage attendance 3. Conduct brief motivational interviewing to reinforce commitment to change 4. Schedule follow-up appointment in 1 week to assess progress and address any barriers to treatment 5. Provide crisis hotline number and educate on signs of severe withdrawal 6. Explore possibility of involving sister as support person in treatment process

# **Example Case Management Notes**

Brenda D. Phillips, Jenny Mincin

#### **Example Case Management Notes:**

Core Skills for Hospital Case Managers Tony Cesta, Beverly Cunningham, 2009-06 Core Skills for Hospital Case Managers A Training Toolkit for Effective Outcomes Toni Cesta PhD RN FAAN Beverly Cunningham MS RN As of June 20 2014 contact hours for nurses are no longer available with this product Finally an affordable effective and consistent training program for your hospital case managers This one of a kind guide to fundamental case management responsibilities is a necessary reference tool for every hospital case management department. This resource is designed to give case management directors and hospital leaders the tools they need to build and strengthen the basic and advanced skills their case management staff needs to succeed Core Skills for Hospital Case Managers is an orientation and training manual for nurses transitioning into case management an easy to read reference guide for new case managers and a source of inspiration tools and resources for seasoned professionals With a flexible format this book and CD ROM offer practical information and customizable tools to develop and maintain a wide variety of care management skills Table of contents Chapter 1 Hospital Case Management 101 Chapter 2 Case Manager Role Chapter 3 Roles Functions and Caseloads Chapter 4 The Case Management Process Chapter 5 The Case Manager's Role in Transitional and Discharge Planning Chapter 6 Utilization Management Chapter 7 Managing Long Length of Stay Patients Chapter 8 Denials Prevention and Appeals Strategies Chapter 9 Reimbursement Chapter 10 The Role of the Case Manager in Patient Flow Chapter 11 Measuring Success Strategic Outcome Measures Chapter 12 Dealing with the Uninsured and Underinsured Chapter 13 Working with Multidisciplinary Teams Chapter 14 Crucial Communication and Conflict Resolution Learning objectives Discuss the evolution of hospital case management Explain the different models of hospital case management Determine the various goals of hospital case management Examine the various roles of case management Discuss the variety of functions performed by case managers Discuss the scope of the case manager position Examine staffing ratios in various models List the steps in the case management process Determine the role of case managers in documentation Examine case managers role in discharge planning List the factors that influence the discharge planning process Determine strategies for improving discharge planning Discuss how hospital reimbursement affects utilization management UM List the stages of UM coordination Determine the affect of outside influences on UM Evaluate different payers regulations regarding UM Examine case management s role in length of stay LOS Evaluate strategies for managing patients with long LOS Identify data used to track and trend LOS Evaluate the reasons behind denials Discuss case management s role in preventing denials Examine case management s roles in reversing denials Examine case management s role in reimbursement Determine strategies for effective case management related to reimbursement Evaluate case management s role in patient flow Discuss demand and capacity management Identify strategies for managing patient flow Identify measurable case management outcomes Explain how case managers can track quality outcome metrics Discuss other metrics case management departments can track and trend Examine ways to create a

case management report card Discuss the unfunded or underfunded patient populations Describe the role of the ED case manager with unfunded or underfunded patient populations Evaluate strategies for dealing with unfunded or underfunded patient populations Examine strategies for successfully working with multidisciplinary teams Describe sources of conflict with which case managers frequently come in contact Discuss strategies for reducing conflict Intended audience Staff nurses charge nurses staff educators staff development specialists directors of education nurse managers and nurse leaders The Case Manager's Handbook Catherine M. Mullahy, 2013-06-20 Written by renowned author Catherine Mullahy The Case Manager's Handbook Fifth Edition is the ultimate how to guide for case managers This practical resource helps case managers build fundamentals study for the Certified Case Manager CCM exam and most importantly advance their careers after the exam Written for all professionals in all practice settings in case management it uses real life examples and an easy to read conversational style to examine the case management process while presenting practical procedural information An excellent daily reference and training guide for new case managers and seasoned professionals in various setting The Case Manager's Handbook Fifth Edition is the go to resource for facing the day to day challenges of case management especially as the nation navigates through the many changes introduced by the landmark Patient Protection and Affordable Care Act Significantly updated and revised it contains eight new chapters Hospital Case Management Changing Roles and Transitions of Care Patient Centered Medical Home ACOs Health Exchanges Evidence Based Practice Public Sector Reimbursement Predictive Modeling Pain Management Health Technology Trends and Implications for Case Managers The Affordable Care Act of 2010 Implications for Case Managers Included with each new print book is an Access Code for a Navigate Companion Website for students with objectives multiple choice questions and bonus appendices **Clinical Management Notes and** Case Histories in Cardiopulmonary Physical Therapy W. Darlene Reid, Frank Chung, 2004 Two primary components present in Clinical Management Notes and Case Histories in Cardiopulmonary Physical Therapy are notes on cardiopulmonary assessment and management and case histories involving respiratory and cardiovascular conditions commonly viewed by physical therapists Accompanying the notes are thought provoking questions and problems that enable the reader to establish a foundation of core concepts The presentation of case histories further facilitates the development of integral skills and enables the reader to integrate those core concepts into a clinical setting Also question and answer guides accompany the patient profiles BOOK JACKET Writing Patient/Client Notes Ginge Kettenbach, Sarah Lynn Schlomer, Jill Fitzgerald, 2016-05-11 Develop all of the skills you need to write clear concise and defensible patient client care notes using a variety of tools including SOAP notes This is the ideal resource for any health care professional needing to learn or improve their skills with simple straight forward explanations of the hows and whys of documentation It also keeps pace with the changes in Physical Therapy practice today emphasizing the Patient Client Management and WHO's ICF model The **Practice of Case Management** Peter Camilleri, 2020-07-16 Case management is used across a diverse range of

organisational settings from child protection to aged care disability services acute and community health courts and correctional services employment services veteran services education and immigration programs However case management is not always successfully implemented and practitioners often feel they are not given sufficient support. The Practice of Case Management draws on extensive practice research to identify the key characteristics of successful case management organisational support developing delivery models to suit individual client needs preparation of staff at all levels and affirmation of the central and active role of the client The authors outline the challenges and complexities faced by case managers acknowledging that their role is often poorly conceptualised and articulated They demonstrate that true engagement enables effective service provision and offer practical strategies for everyone involved in the case management process to facilitate negotiation accountability and the achievement of positive outcomes **Emergency Department Case** Management Karen S. Zander, 2007 Eliminate sky high wait times and increased denials in your ED Hospitals across the country are seeing extreme backup in the emergency department ED In recent years well structured emergency department case management programs have repeatedly demonstrated their value in Influencing capacity Assigning patients to appropriate levels of care Targeting complex discharge needs Assisting with proper utilization review Whether you are looking to implement maintain or evolve your ED case management program eliminate confusion surrounding the process with the help of Emergency Department Case Management Strategies for Creating and Sustaining a Successful Program Examining all perspectives of ED case management this new and comprehensive guide will help you define a program that best suits your facility s needs All the tools you need to get your program up and running From defining goals clarifying roles and understanding the necessary knowledge and skill sets required from ED case management staff Emergency Department Case Management will help to ensure that you have a solid and sustainable foundation in place After exploring models and reviewing your infrastructure Emergency Department Case Management will help you outline key partnerships present multiple options for case finding tackle observation status address quality and evaluation issues and identify ways ED case managers can contribute to care coordination for complex pediatric psychiatric homeless and uninsured populations Written by Kathleen Walsh RN MS and Karen Zander RN MS CMAC FAAN from the Center for Case Management Emergency Department Case Management provides advice and best practices from two of the nations top case management experts Take a look inside at the table of contents Chapter 1 ED Case Management The Heart of Access Chapter 2 The Foundation Chapter 3 Partnerships Chapter 4 The Process Chapter 5 Developing interventional strategies Chapter 6 Observation status determination Chapter 7 Program level evaluation Chapter 8 Information system support Chapter 9 Quality Chapter 10 Addressing the pediatric population Chapter 11 Responding to the psychiatric population Chapter 12 Strengthening an existing program It's also packed with 15 detailed case studies discussing ED case management strategies as well as five spotlight accounts detailing the experiences of ED professionals from across the country including A case manager A social

worker A psychiatric nurse An information systems specialist An ED physician Don t hesitate to jumpstart your ED case management program From beginning to end Emergency Department Case Management will serve as the lead architect to help you design build and strengthen your ED case management model order your copy today Learning objectives Conceptualize a framework for setting up an ED case management program Develop policies procedures and role descriptions Identify structural components tools and processes to support an ED case management program Describe potential outcomes of an ED case management program Who should buy this book Emergency Department Case Management is the perfect resource for case managers directors of case management ED nurse managers social workers ED directors administrators and CFOs HCPro Inc has confirmed that none of the faculty presenters or contributors has any relevant financial relationships to disclose related to the content of this educational activity The HCPro Risk Free Money Back Guarantee If for any reason you re not completely satisfied with your purchase return it within 30 days and you will receive a prompt polite 100% refund no questions asked **Foundations for Community Health Workers** Tim Berthold, Alma Avila, Jennifer Miller, 2009-08-13 Foundations for Community Health Workers Foundations for Community Health Workers is a training resource for client and community centered public health practitioners with an emphasis on promoting health equality Based on City College of San Francisco's CHW Certificate Program it begins with an overview of the historic and political context informing the practice of community health workers The second section of the book addresses core competencies for working with individual clients such as behavior change counseling and case management and practitioner development topics such as ethics stress management and conflict resolution. The book s final section covers skills for practice at the group and community levels such as conducting health outreach and facilitating community organizing and advocacy Praise for Foundations for Community Health Workers This book is the first of its kind a manual of core competencies and curricula for training community health workers Covering topics from health inequalities to patient centered counseling this book is a tremendous resource for both scholars of and practitioners in the field of community based medicine It also marks a great step forward in any setting rich or poor in which it is imperative to reduce health disparities and promote genuine health and well being Paul E Farmer MD PhD Maude and Lillian Presley Professor of Social Medicine in the Department of Global Health and Social Medicine at Harvard Medical School founding director Partners In Health This book is based on the contributions of experienced CHWs and advocates of the field I am confident that it will serve as an inspiration for many CHW training programs Yvonne Lacey CHW former coordinator Black Infant Health Program City of Berkeley Health Department former chair CHW Special Interest Group for the APHA This book masterfully integrates the knowledge skills and abilities required of a CHW through storytelling and real life case examples This simple and elegant approach brings to life the intricacies of the work and espouses the spirit of the role that is so critical to eliminating disparities a true model educational approach to emulate Gayle Tang MSN RN director National Linguistic and Cultural

Programs National Diversity Kaiser Permanente Finally we have a competency based textbook for community health worker education well informed by seasoned CHWs themselves as well as expert contributors Donald E Proulx CHW National The Case Manager's Handbook Catherine M. Mullahy, 2013-06-20 Written Education Collaborative University of Arizona by renowned author Catherine Mullahy The Case Manager's Handbook Fifth Edition is the ultimate how to guide for case managers This practical resource helps case managers build fundamentals study for the Certified Case Manager CCM exam and most importantly advance their careers after the exam Written for all professionals in all practice settings in case management it uses real life examples and an easy to read conversational style to examine the case management process while presenting practical procedural information An excellent daily reference and training guide for new case managers and seasoned professionals in various setting The Case Manager's Handbook Fifth Edition is the go to resource for facing the day to day challenges of case management especially as the nation navigates through the many changes introduced by the landmark Patient Protection and Affordable Care Act Significantly updated and revised it contains eight new chapters Hospital Case Management Changing Roles and Transitions of Care Patient Centered Medical Home ACOs Health Exchanges Evidence Based Practice Public Sector Reimbursement Predictive Modeling Pain Management Health Technology Trends and Implications for Case Managers The Affordable Care Act of 2010 Implications for Case Managers Included with each new print book is an Access Code for a Navigate Companion Website for students with objectives multiple choice questions and bonus appendices Instructor's Resource Guide with Case Notes to Accompany Global Marketing Management Case Studies in Nursing Case Management Suzanne Smith Masaaki Kotabe, Syed Tarig Anwar, 2001 Blancett, Dominick L. Flarey, 1996 Case Studies in Nursing Case Management provides portrayals of health care organizations around the nation that have successfully implemente d case management programs It reports on how case management is being used in inpatient ambulatory operating room intensive care home h ealth and subacute settings Specific populations such as pediatric maternity dialysis geriatric psychiatric and AIDS HIV patients are also addressed Case managers roles in managed care and community based settings as well as in insurance companies are described

Essentials of Managed Health Care Peter Reid Kongstvedt,2003 Good Practice in Brain Injury Case

Management Jackie Parker,2006-05-15 This book provides a guide to effective case management outlining all the key issues that professionals working with brain injured people will need to know from understanding what brain injury actually is and how it feels to experience it to strategies for rehabilitation assessing risk and implementing support plans

Disaster

Recovery Brenda D. Phillips, Jenny Mincin, 2023-07-18 Now in its third edition Disaster Recovery continues to serve as the most comprehensive book of its kind and will span the core areas that recovery managers and voluntary organizations must tackle after a disaster It remains the go to textbook for how to address and work through housing donations volunteer management environmental recovery historic and cultural resources psychological needs infrastructure and lifelines

economic recovery public sector recovery and much more Special features include instructor s manual PowerPoints a free consultation with the authors upon adoption of the text updated discussion questions references and recommended readings and updated resources for each chapter New to the 3rd Edition A new co author Jenny Mincin a recognized expert in international disaster recovery with direct field experience in emergency management disaster recovery and humanitarian relief to this text New case examples from recent disasters and humanitarian crises will provide updated content and offer familiar events to readers e g Hurricane Mar a the COVID 19 pandemic active attackers Increased visibility to the highest risk populations facing disaster recovery including refugees immigrants and asylees New chapter on case management which will be of particular interest to faculty in human services degree programs Climate change as a hazard that requires adjustment before a disaster and during recovery A broadened consideration of recovery needs including refugees and asylees fleeing both conflict and consensus disasters This is an invaluable textbook in the field of recovery preparedness and execution **COLLABORATE(R) for Professional Case Management** Teresa Treiger, Ellen Fink-Samnick, 2015-04-15 This book is about the progressive improvement of case management beyond that which it exists to that of a practice specialty focused on professionalism and collegiality across all practice settings Our desire to produce a framework for such practice began when we connected several years ago It was a result of a dialogue the sharing of our stories and experiences Separately we were already passionate about and committed to case management excellence Together our vision coalesced to form this competency based framework for advancing case management captured by an acronym which defined the essence of professional practice COLLABORATE We spent hours discussing the implications of a perceived epidemic involving less than productive interactions between individuals working under the title of case manager with consumers providers and clinical colleagues These accumulated experiences heightened our commitment to lead much needed change Our conversation endured over many months as we realized a shared Respect for case management s rich heritage in healthcare across professional disciplines and practice settings Concern for those factors which devalue case management s professional standing Agreement that while the practice of case management transcends many representative professional disciplines and educational levels each stakeholder continues to cling to their respective stake in the ground and Belief of the importance for case management to move from advanced practice to profession once and for all COLLABORATE was borne from a vision the mandate to solidify a foundation for case management practice which combines unique action oriented competencies transcends professional disciplines crosses over practice settings and recognizes educational levels The ultimate focus is on improving the client's health care experience through the promotion of effective transdisciplinary collaboration COLLABORATE recognizes the hierarchy of competencies and practice behaviors defined by the educational levels of all professionals engaged associate bachelors masters and doctoral degrees across practice disciplines Through this approach every qualified health and human service professional has a valued place setting at case management s ever

expanding table Each of the competencies are presented as mutually exclusive and uniquely defined however all are complementary and call on the practitioner to conduct work processes in a wholly integrated manner While appearing in order for the acronym's sake they are not necessarily sequential Ultimately case management is an iterative process When united in a comprehensive and strategic effort the COLLABORATE competencies comprise a purpose driven powerful case management paradigm The agility of this model extends to use of key concepts that include both action oriented verbs and nouns which are significant elements in any professional case management endeavor To date case management practice models have been driven by care setting and or business priorities Unfortunately this exclusivity has contributed to a lack of practice consistency due to shifting organizational and regulatory priorities However this is only one reason for a fragmented case management identity COLLABORATE recognizes and leverages these important influencers as critical to successful practice and quality client outcomes Interprofessional education and teamwork are beginning to emerge as the means to facilitate relationship building in the workplace Through this approach health care practitioners absorb the theoretical underpinning of intentionally work together in a mutually respectful manner which acknowledges the value of expertise of each care team stakeholder. This educational approach provides the opportunity to engage in clinical practice that incorporates the professional standards to which we hold ourselves accountable Innovative and emerging care coordination models defined by evidence based initiatives appear across the industry Each promotes attention to interprofessional practice in order to achieve quality patient centered care Herein lies an opportunity to demonstrate the value drawn from diverse expertise of case managers comprising the collective workforce However a critical prefacing stage of this endeavor involves defining a core practice paradigm highlighting case management as a profession The diverse and complex nature of population health mandates that case management intervene from an interprofessional and collaborative stance While inherent value is derived from the variety of disciplines this advanced model unifies case management s unique identity Now is the time to define and adopt a competence based model for professional case management COLLABORATE provides this framework This text is presented in four sections Section 1 Historical validation of why this practice paradigm is critical for case management to advance to a profession Section 2 Presentation of the COLLABORATE paradigm with a chapter to devoted to each distinct competency and the key elements Section 3 Practical application of the book s content for use by the individual case manager and at the organizational level and The Epilogue Summarizes the COLLABORATE approach in a forward looking context For the reader with limited time reviewing Section 2 provides the substantive meat associated with each of the competencies Our ultimate desire is that the COLLABORATE approach provides an impetus for all stakeholders e g practitioners educational institutions professional organizations to take the necessary steps toward unified practice in order to facilitate the transition of case management considered as a task driven job to its recognition as being a purpose driven profession The book provides a historical validation of why this new practice paradigm is critical for case management

to advance as a profession presents the COLLABORATE paradigm with a chapter to devoted to each distinct competency and the key elements and covers the practical application of the book s content by individual case managers and at the Fundamentals of Nursing Carol R Taylor, Pamela Lynn, Jennifer organizational level Fire Management Notes ,1984 Bartlett, 2022-08-04 Trusted for its holistic case based approach Fundamentals of Nursing The Art and Science of Person Centered Nursing Care 10th Edition helps you confidently prepare the next generation of nursing professionals for practice This bestselling text presents nursing as an evolving art and science blending essential competencies cognitive technical interpersonal and ethical legal and instilling the clinical reasoning clinical judgment and decision making capabilities crucial to effective patient centered care in any setting The extensively updated 10th Edition is part of a fully integrated learning and teaching solution that combines traditional text video and interactive resources to tailor content to diverse learning styles and deliver a seamless learning experience to every student Potter & Perry's Essentials of Nursing Practice, SAE, E book Patricia A. Potter, Anne G. Perry, Patricia A. Stockert, Amy Hall, 2021-06-16 Potter and Perry's Essentials of Nursing Foundation is a widely appreciated textbook for the teaching learning of nursing foundations Its comprehensive coverage provides fundamental concepts skills and techniques of nursing practice in the areas of nursing foundation This South Asian Edition of Potter and Perry's Essentials of Nursing Foundation not only provides the well established authentic content of international standard but also caters to the specific curricular needs of nursing students and faculty of the region as the content is exactly tailored according to the Indian Nursing Council curriculum Most Comprehensive Content is presented comprehensively so that the textbook is very easy to read and comprehend Most Lucid Content is very simple for non English speaking Indian students It is an easy to read interesting and involving disposition which leads the reader through various facts of nursing foundation Indian Student friendly Exactly as per syllabus prescribed by INC for B Sc Nursing course and also useful for Diploma Nursing course It has improved layout design and presentation through addition of images and illustrations Many images have been replaced with Indian ones to provide regional feel of the content Region specific content There is inclusion of region specific content such as o Nursing education nursing cadres registration licensing Indian medico legal laws health care delivery system new trends of nursing in India o Updated detailed history of nursing in India o Major recent health policies in India such as National Health Policy 2017 and Biomedical Waste Management rules 2016 o Code of Ethics for Nurses in India Additional chapters o Hospital admission and discharge o Equipment and linen o Diagnostic testing o First aid and emergencies A complete and student friendly text in Nursing Foundation of Global standards with local appeal Additional chapters o Hospital admission and discharge o Equipment and linen o Diagnostic testing o First aid and emergencies An Educator's Guide to Assessing Threats in Student Writing Brian Van Brunt, W. Scott Lewis, Jeffrey H. Solomon, 2020-10-26 Based on research from the threat assessment community this important resource addresses the challenge of assessing concerning online communication written narratives and

artistic works at schools colleges and universities Drawing from the collective fields of law enforcement law and psychology the authors expand on evidence based practices to help student affairs staff and K 12 educators best assess the validity of these communications and develop intervention and management plans Concepts are supported through numerous examples of social media posts written fiction work emails and examples from past attacks as well as averted plans Appropriate for the classroom Behavioral Intervention Teams frontline teaching staff and administrators this new resource will ensure an evidence based approach to early assessment and intervention Helping At-risk Youth Elaine Morley, Shelli B. Rossman, 1997 States the need for community based integrated services to meet the many needs of at risk youth and their families Discusses services integration case management parental involvement tutoring mentoring fund raising and monitoring program outcomes CMSA Core Curriculum for Case Management Hussein M. Tahan, Teresa M. Treiger, 2016-07-05 The fully updated CMSA Core Curriculum for Case Management 3rd edition is the definitive roadmap to an informed effective collaborative case management practice This comprehensive expertly written guide provides those directly or indirectly involved in case management with information about best practices descriptions of key terms essential skills and tools that fulfill the current Case Management Society of America's CMSA standards and requirements Addressing the full spectrum of healthcare professional roles and environments this is both a crucial certification study guide and vital clinical resource for the case management professionals in all specialty areas from students to veteran case managers This unique resource provides the core knowledge needed for safe cost effective case management with the following features NEW text boxes highlighting key information and vital practices in each chapter NEW and updated Standards of Practice implications in each chapter NEW and updated content on transitions of care community based care care coordination Value Based Purchasing ethics and social media the impacts of health care reform and digital technology NEW and updated content on accreditation in case management NEW chapter that lists key additional resources by topic Official publication of the Case Management Society of America connecting CMSA core curriculum to current CMSA Standards of Practice Easy to grasp detailed topical outline format for quick scan of topics Complete updated core knowledge required of case managers with expert descriptions and direction on areas including Case management roles functions tools and processes Plans clinical pathways and use of technology Transitional planning Utilization management and resource management Leadership skills and concepts Quality and outcomes management legal and ethical issues Education training and certification Health care insurance benefits and reimbursement systems Practice settings and throughput Interdisciplinary teams needs in hospitals community clinics private practice acute care home care long term care and rehab settings palliative care and hospice settings Up to date guidance on case management specialty practices including nursing life care planning workers compensation disability management care of the elderly behavioral health transitions of care subacute and long term care utilization review management primary care and medical health home and more Essential content for academic reference



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