

Assessment Process

Getting to Details



Where does TBC Fit

Who on the team contributes to the assessment?

- MA's provide screenings, document results, care coordination, and identify patients who may benefit from the extended team members
- Providers conduct the medical exam and assessment and define the medical treatment plan and targets
- Social Workers provide care coordination services, counseling, education, and patient support
- Nurses/nurse care managers provide care coordination services, education, and self-management
- Nutritionist/Dieticians/CDE's provide nutritional counsel and education
- Others

Case Management, according the CCMC.....

- Case management is:
- A professional and collaborative process that
 - **Assesses, plans,** implements, coordinates, monitors, and evaluates the options and services required to meet an individual's health needs.
 - It uses communication and available resources to promote health, quality, and cost-effective outcomes in support of the 'Triple Aim,' of improving the experience of care, improving the health of populations, and reducing per capita costs of health care." (CCMC, 2015, p. 4)

Key Principles to consider while assessing....

- Based on the cultural beliefs, values, and needs of clients/support systems, and in collaboration with all service providers (both healthcare professionals and paraprofessionals), case managers link clients/support systems with appropriate providers of care and resources throughout the continuum of health and human services and across various care settings.
- They do so while ensuring that the care provided is safe, effective, client-centered, timely, efficient, and equitable. This approach achieves optimum value and desirable outcomes for all stakeholders.

Before starting... Get to know the population served in your clinic/practice/community

- Age
- Prevalent diseases & status
- Income
- Primary language
- Ethnicity
- Resources – community, specialist, technical
- Religion
- Rural vs Urban

What do you know about the patient population of the clinic(s) you will be serving?

Pertinent to your role, what will be your primary function?

- Care coordination
- Education
- Self-management support

Focusing on the assessment

- The Case Management Process is centered on clients/support systems.
- It is **wholistic in its handling of clients' situations** (e.g., addressing medical, physical, functional, emotional, financial, psychosocial, behavioral, spiritual, and other needs), as well as those of their support systems.
- Consider the patients health:
 - “An individual’s physical, functional, mental, behavioral, emotional, psychosocial, and cognitive condition. It refers to the presence or absence of illness, disability, injury, or limitation that requires special management and resolution, including the use of health and human services-type interventions or resources.”

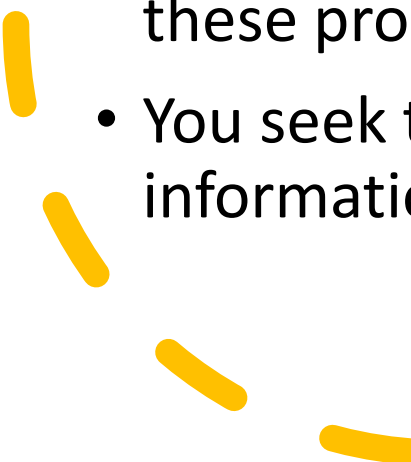
According to
CCMC...

The Assessing phase involves the collection of information about a client's situation like those reviewed during screening, however to greater depth. The information you collect about your client/support system may include:

- Past and current health conditions
- Service utilization
- Socioeconomic and financial status
- Health insurance plan benefits and coverage
- Home condition and safety
- Availability of prior services
- Physical, emotional, and cognitive functioning
- Psychosocial network and support system
- Health engagement
- Self-care knowledge and ability
- Readiness for change

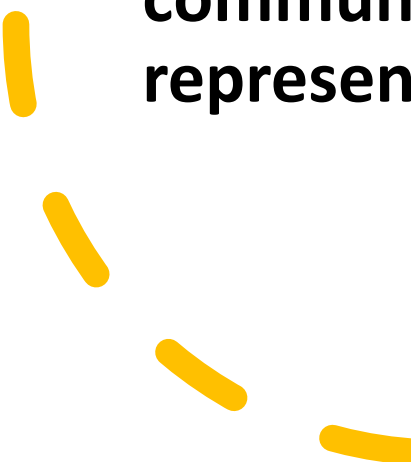


Three primary objectives while assessing your client/support system:

- Identifying the client's **key problems to be addressed**, as well as individual **needs and interests**
 - Determining the expected **care goals** and **target outcomes**
 - Developing a comprehensive case management plan of care that addresses these problems and needs while allowing you to achieve the care goals
 - You seek to confirm or update your client's risk category based on the information you have gathered.
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Using standardized assessment tools and checklists, you:

- **Gather** the essential information **telephonically** or through **face-to-face** contact with your **client**, the client's **support** system, and the **clinicians involved** in your client's care.
 - Collect necessary information through a **review of current and past medical records, personal health records** if available, and **communication with your client's employer, health insurance plan representative, and others** as you deem appropriate.
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The Assessment Process

- Assign
 - Who – What – When
- Engage
 - Patient desire, needs, ability
- Gather
 - Records, information from other clinicians, patient self-reported
- Analyze
 - Data
- Identify problems



Real Play Simulation

Our client Judy:

Judy, was diagnosed with heart failure 1 ½ years ago and has been managing that well working with her PCP.

She reports her spouse passed away 6 months ago. Today Judy is in the office for follow up with her PCP.

Her Blood Pressure and A1C are out of scope and he notes that she is just “not herself”.

The PCP needs your help!