Stress Factors in Case Management

Christina Ganpath and Alejandra Lopez

NUR 4030

November 29, 2017

Case managers have many roles and responsibilities which include: collaboration with healthcare teams, patient advocacy, resource management, and much more. (Powell & Tahan, 2010, p 39-42) Case managers oversee discharge planning and assure that insurance companies and resources are available for quality patient care. It is the case manager’s role to make sure that optimal care management is given to produce good outcomes. Outcomes that come from optimal case management include: patient satisfaction, quality care, matching needs and resources correctly, continuity of care, effective monitoring of safety, effective collaboration and communication with health care providers while including the patient, efficient use of resources, cost-efficient care, patient advocacy, and much more. (Powell & Tahan, 2010, p 36-37) Although case managers are trained for the workload, case managers are extremely susceptible to stress factors.

Case management is more of a process than it is a set of tasks. Thinking of case management as the process it is can trigger stress. This is because for case managers, there is always more work to be done, more patients to advocate for, and more responsibilities to manage. (Bowman, 2007). Case managers are responsible for handling multiple cases per day, all with different issues, acuities, complexities, and much more. (Bowman, 2007) For case managers, stress is inevitable. Stress factors in the workplace include: increased workload, increased patient census, unsafe work environment, workplace dissatisfaction, nurse burnout, and much more. An increased workload would make it difficult for the case manager to prioritize patient needs, and possibly lessen the time he/she must address patient needs. An increased patient census is like an increased workload because the more patients a case manager has, the more the workload is increased. An increase in patient census would be a stress factor for the case manager because the case manager would have more patients to care for, more patients to advocate for, and more responsibilities to manage. An unsafe work environment would add to the case manager’s stress because the case manager would not feel safe to speak openly within the work environment. The case manager would feel stressed about not being able to openly advocate for his/herself or his/her patients. This stress would also increase workplace dissatisfaction. If workplace dissatisfaction is present, the case manager may not feel comfortable in the work environment and the stress factors would be increased. These different stress factors ultimately lead to nurse burnout. Nurse burnout leads to decreased productivity, an increased potential of errors, and a decrease in patient and nurse safety.

Because case managers deal with a myriad of tasks, it can be difficult for a case manager to feel in control of the situation, thus increasing stress. Many times, case managers will have everything under control one minute, and the next minute the unexpected happens, causing the case manager to lose a bit of control. For example, the case manager can have the entire day planned out. This would help the case manager remain organized and in control of the planned tasks. However, if the unexpected happens with a patient, such as the patient’s condition deteriorates unexpectedly, the case manager would need to focus his/her attention to this patient. When this happens, the case manager needs to adjust the plan accordingly, delaying planned tasks is possible to deal with this priority situation. Because case managers must never delay care/services to their patients, accomplishing all these tasks in a time accordingly fashion may be difficult. When a case manager does not finish the appropriate tasks within a certain time frame, stress may increase.

Case managers are required to remain professional and to handle their given tasks appropriately. However, the complexity of patient conditions, number of cases, responsibilities of coordinating care, and having to communicate with multiple people including members of the interdisciplinary team, family, the patient, and the insurers, may all add to job stress for the case manager. (Bowman, 2007)

As patient advocates, case managers must assess the patient, their needs, and wants. A case manager must always advocate for the patient’s quality of life and must always advocate for the patient’s autonomy. To be an effective patient advocate, the case manager must be culturally competent. This will increase their effectiveness as a patient advocate. The case manager can then incorporate the patient’s beliefs and needs along with community resources that can satisfy the patient’s needs. In addition, if the case manager and healthcare team is culturally competent, the patient is more trusting and willing to be a part of discharge planning and what it entails. Cultural competency is a necessity for case managers to succeed in their primary role of patient advocate. However, for case managers with multiple cases per day, it may be difficult to be culturally competent with each patient. This is another stressor that is important for case manages to realize. Although case managers are busy, they must advocate for their patients, and they can only do so by being culturally competent. However, this is no easy task. This step although vital for patient advocacy, may add more tasks to the case managers day causing the case manager more stress.

A study conducted on nurse managers working in community mental health centers across Ohio showed that case managers who perceived their agencies as offering high levels of recovery-oriented services have a greater sense of job satisfaction and accomplishment. (Kraus & Stein, 2013) The study showed that “case managers who perceived their agencies to offer high levels of recovery-oriented services were less likely to report professional burnout” (Kraus & Stein, 2013, p 12) This study showed that the higher the emotional attachment to the workplace and the higher the job satisfaction, the lower the burnout rate. This is important because an increase in job satisfaction will help reduce nurse burnout and stress. However, it is important to note that an emotional attachment to the workplace is not always a good thing. If the case manager gets too emotionally attached, the case manager will feel higher levels of stress when it comes to the particular case. It is important for a case manager to care, however, if the case manager becomes emotionally invested, stress levels will rise, and the case manager will not be able to perform his/her job efficiently. This stressor, although not a workplace stressor, is important for case managers to look out for to remain professional with all the cases.

Case managers must communicate with all members of the team. If there is a lack of communication in any way, the entire case may not be handled effectively. Because case managers act as patient advocates, it is important that communication between all parties involved remains open and intact. The moment there is lack of communication, patient advocacy may be affected. Often, case managers find it difficult to communicate with all the members of the team. This is because, the more complicated the case is, the more parties are involved in the case. Most of the times, case managers spend a lot of their time speaking to the insurance companies to assure payment for services and what equipment is allotted for the patient’s needs. Case managers must make sure that they are communicating with all parts of the team including the physician, therapists, nurses, the patient, the patient’s family, specialty services, rehabilitative programs, insurance companies, and much more. If services do not go as planned, or if the insurance refuses to pay for needed services or medical equipment, the case manager is required to find another solution to this problem. This within itself is a stressor because often, this process becomes very time consuming. With case management, this process repeats itself multiple times throughout multiple cases, further increasing this stress factor for the case manager.

Time management is often the most stressful factor for case managers. They are constantly being looked at to ensure that services are being completed in a timely fashion. Insurance reimbursement is very specific with time frames allotted, and the pressure of this time constraint increases workplace stress for the case manager. Case managers are often given more patients than they can handle with little thought about patient acuity. If patient acuity increases, the case manager may have to spend more time with the patient. If the patient has financial problems, that would also increase the time that needs to be spent with the patient. All these different complexities vary from one patient to another. This increases case manager stress because the case manager has specific time frames to abide by. In addition, case managers must also take the inevitable into account. Patients may deteriorate rapidly, requiring more attention and time from the case manager, thus increasing the stress the case manager deals with.

Minimizing these stressors are no easy task. “Handling these stressors requires time management, prioritization, organization, flexibility, and much more.” (Bowman, 2007, p 252) Time management is a skill that many people struggle to obtain. For case managers, time management is the key to being able to get through the day successfully. Case managers have loads of different cases that they may be responsible for. Without effective time management, case managers can easily get overwhelmed and be unsuccessful at their job. Effective approaches to time management include: assessing for time robbers, making lists, learning to prioritize, setting clear goals, being efficient, delegating, being succinct, and by planning ahead. (Powell & Tahan, 2010) Assessing for time robbers, setting clear goals, being efficient, and being concise, allows the case manager to remove distractions, know exactly what needs to be done, and how to approach the day. Making lists will help keep the day planned while giving the case manager a list of what must be done, prioritizing the most important on the top of the list. Finally, by planning ahead, the case manager has extra time that may be used for any unplanned emergencies or duties. When using these time management approaches, it is important to remember that case managers are dealing with patients and their lives. No case should be rushed to save on time, seeing as this will only have negative outcomes. However, allowing time to dedicate to each case will allow for efficient and quality care to be provided. This will reduce stress for the case manager, allowing him/her to complete her tasks more efficiently.

How stress is handled is different for each individual. It is essential that case managers have the support of their staff, physicians, and fellow case managers in order to deal with stress in a positive manner. Having a network of peers and professionals to whom to ask for advice and feedback is essential for case managers, especially to those who are new to the field. (Bowman, 2007, p. 252) When case managers are able to rely on their team, they do not feel like they are carrying the workload on their own. They are able to ask for help and feel comfortable working in the environment. Working together with other case managers reduces stress and promotes coordination of patient care.

Another strategy that can be used is role clarification, which reduces confusion, and in turn reduces stress. It is important to clarify the role and authority of the case manager so that each individual is aware of his/her responsibilities and contributions to the team. “Effective role clarification can help avoid redundancies in jobs, empower staff, foster effective relationships among staff, increase productivity, enhance job satisfaction, and improve outcomes” (Powell & Tahan, 2010, p. 351). Case managers will carry out their role according to how they understand the job description to be. To ensure that individuals understand their role, the roles and responsibilities should be described in a simple manner. Also setting time for meetings to give and receive feedback ensures that the case manager is aware of what his/her responsibilities entail. The use of role-playing and problem solving techniques allow case management leaders to clarify what the case manager’s role is about, what authority means, and how to cope with possible stressors (Powell & Tahan, 2010, p. 351)

Because the case manager’s role is interdependent with other members on the healthcare team, effective communication is crucial. Without effective communication, case managers cannot advocate for patient’s needs, which further increases stress. Case managers must communicate with healthcare providers and agency members to coordinate the care and services they represent. This is not always easy, and conflicts may arise with different ideas about what is best for the patient. To ensure that everyone’s ideas are taken into consideration, communication should include “goals and expectations, model designs, table of organization, impact on the healthcare team, and how each staff member can assist in the success of the case management program” (Powell & Tahan, 2010, p. 352). This will ensure that everyone agrees with and understands the plan of care, thus reducing conflicts and stress.

It can be difficult for case mangers to find their optimal level of stress. Through self-awareness, case managers are able to identify their stress level, which can prevent stress overload. Indicators for stress overload vary among each case manager but may include “poor judgment, burst of anger or frustration, depression, forgetfulness, preoccupation with worrying, nonproductive time, isolation, and inability to make decisions” (Powell & Tahan, 2010, p. 350). Stress overload can negatively affect decisions made about patient care. In contrast, being content with the outcomes achieved, and satisfied with one’s job are positive signs that indicate that stress is under control (Powell & Tahan, 2010, p. 350). It is essential that case managers have an optimal level of stress to better care for patients and advocate for their needs.

Workplace factors such as staffing and scheduling contribute to fatigue, stress, and depression. To cope with these stressors, stress reduction programs where case managers may seek counseling may be beneficial. In a study conducted, case managers had a four-hour training in which they learned about the brain and impact of stress, coping modalities, and the effectiveness of stress reduction. Conflicts that occurred during work were addressed as a group. The study yield that case managers were stressed twice as much before attending the four- hour training program compared to after the training (“Helping health care workers cope with stress”, 2013, p. 92). The study demonstrates the effectiveness of implementing training programs that are aimed at reducing stress. This gives case managers the opportunity to learn about what stress is and how it can be dealt with.

Another technique that can be used to reduce stress is staying organized. Case managers often deal with multiple cases and it can make it difficult to stay on task when he/she is not organized. It may be helpful for case managers to start the day off by looking at the census for his/her unit and making a list of what patients require that day. This provides structure as to what needs to be done that day. Other tools to stay organized include calendaring, and having a diary system where he/she can write down things that can help him/her stay on task. “If case managers are not organized, they will not be able to handle their caseloads effectively and they will burn out” (Arnold, Lambert, Llewellyn & Mitchell, 2009).

It is also important that case managers remain flexible so that they are able to adjust to unexpected events that may occur. “Knowing when to say no and asking for help is also important” (Arnold et al., 2009). Case managers are often assigned to a variety of cases and it can be difficult to manage every case alone. It is essential that case managers work in an environment where help is offered and resources are shared (Arnold et al., 2009).

According to Arnold et al., case managers often make no time to care for themselves (2009). Because case management is a difficult job, it is essential that case managers find activities that help them de-stress. Exercise, yoga, dancing, and listening to music are some forms of relaxation techniques. It is important that case managers take care of themselves so that they remain healthy and are able to perform their role as a case manager. Often, the workload is too much, and breaks are missed. Case managers must take some time out of their day to de-stress. Case managers that ignore signs of stress may fall into depression or binge on alcohol (Arnold et al., 2009).

The workplace of an individual has an impact on the individual’s well-being and attitudes (Glazer & Liu, 2017, p. 16). An environment filled with time pressures affects communication among healthcare providers and increases stress (Glazer & Liu, 2017, p. 16). The workplace should be a safe environment where staff members empower each other and collaborate with one another to meet the patient’s needs. Case managers should feel comfortable talking with case management leaders when issues arise.

Another strategy that can help case managers cope with stress is problem- focused coping. This allows individuals to express one’s emotions in a healthy manner. In problem-focused coping individuals work together to form a strategic plan that meets certain goals (Glazer & Liu, 2017, p. 19). Problem-focused coping allows healthcare providers to share their ideas and thoughts in order to target the problem. It includes problem solving, time management, and obtaining social support (Glazer & Liu, 2017, p. 20). Most often, problems with challenging patients arise and case mangers can become stressed about not knowing how to handle the situation. With problem-focused coping case managers can identify the problem and obtain help from colleagues to find a solution that addresses the situation.

Case managers are confronted with stressful situations on a daily basis. Often they are confronted with patient’s emotional traumas such as grief and anger. As a way of helping case managers deal with emotional situations, meetings focused on discussing emotional and social aspects of work should be implemented (Austen, 2016, p. 377). Case managers should be allowed to talk about emotional issues and reflect on the situation. Individuals can also share coping strategies that they have developed to cope with certain situations. Meetings can also be aimed at identifying possible stressors at work and learning new coping mechanisms.

It is necessary that case managers develop and maintain a support system from upper management and their peers. Case managers cannot be expected to know everything and sometimes require the training and knowledge of more experienced individuals. When a strong support system is developed, individuals have the needed resources and training available to them. They can call on peers for ideas on cases in which they lack knowledge about. Individuals can also go to upper management when they are unable to handle difficult situations. Case managers should always have someone to turn to, when they encounter a problem. This mutual support system is an effective means of reducing stress and enhancing a positive attitude (Powell & Tahan, 2010, p. 354).

Stress is inevitable, but can be prevented. Case managers must learn to recognize the signs of stress and possible factors that may contribute to stress. Once case managers have identified those factors they can focus on ways to reduce their stress. It is important that case managers have an optimal level of stress so that they can be successful in their roles as case managers. “An optimal level of stress is the perfect motivator and essential for success (Powell & Tahan, 2010, p. 349).

**Reference**:

Arnold, L., Lambert, K., Llewellyn, A., & Mitchell, E. (2009, June). Innovative methods help

case managers cut stress. Retrieved November 25, 2017, from

<https://www.ncbi.nlm.nih.gov/pubmed/12038048>

Austen, L. (2016). Increasing emotional support for healthcare workers can rebalance clinical

detachment and empathy. *British Journal Of General Practice*, *66*(648), 376-377.

doi:10.3399/bjgp16X685957

Bowman, J. (2007) Dealing with Job Stress: Peer Support, Time Management, and Self-Care are

Key. *Professional Case Management,12 (5),* 252-253. doi:

10.1097/01.PCAMA.0000291422.69234.3e

Glazer, S., & Liu, C. (2017). Work, Stress, Coping, and Stress Management. *Oxford Research*

*Encyclopedia of Psychology*. 1-45. doi:10.1093/acrefore/9780190236557.013.30

Kraus. S. W., & Stein, C. H. (2013). Recovery- Oriented Services for Individuals with Mental Illness and Case Managers’ Experience of Professional Burnout. *Community Mental Health Journal, 49,* 7-13. doi: 10.1007/s10597-012-9505-2

Helping health care workers cope with stress. (2013). *Hospital Employee Health*, *32*(8), 91-92.

Powell, S. K., & Tahan, H. A. (2010). *Case management: a practical guide for education and practice* (Third ed.). Philadelphia: Wolters Kluwer Health/Lippincott Williams & Wilkins.