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NURSING CASE MANAGEMENT

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A case manager is a pivotal component and a prime mover when it comes to the managed care environment. Case management involves collaborating, assessing, planning, implementing, coordinating, evaluating options, services, and resources that a client requires to maintain health and in some cases, independent functioning (Powell, 2003, pg. 5). Case managers (CM) are key players when it comes to coordinating care; making them major advocates to the clients they serve. Being an advocate as a case manager means having the knowledge of admission and acceptance criteria for various programs, services, and resources, knowing relevant laws and regulations that may influence a client’s eligibility to these services, demonstrating negotiation and astute communication skills in order to get the job done (C. Griggs et al, p. 6). Because a case managers job requires coordination with many different disciplines, their job is on going; sometimes facing a multitude of obstacles, especially if a patient has many comorbidities or an ever-changing medical condition. In addition to this, the patient themselves or family caregivers often gets involved and might disagree or feel dissatisfied with service outcomes. These factors contribute to the complexity of a case managers role, and unfortunately the role and responsibilities that goes along with it most certainly contributes to stress. Stress is a perception of a threat or an expectation of future discomfort that arouses, alerts, and otherwise activates an individual’s affect or behavior in an undesirable way (Powel, 2003, p. 468). Stress can be a positive motivator that gives a person the boost they need to accomplish a task; however, it can also be the tornado that wreaks havoc in that person’s life causing physical, psychological, emotional, and mental upsets. Due to the demands of the profession, and the expectations of the job, job stress is greatly associated with it. The key importance here is to find a balance between having the right amount of stress that will allow the case manager to complete the task in an efficient way, while being mindful of his or her own health and wellness. The trick is to learn effective problem solving techniques to handle stress in order to be a successful case manager. Some of these techniques include but are not limited to working with a partner/mentor for peer support, learning prioritization and flexibility, being organized, performing variance analysis and knowing desired outcomes, delegating, adopting cultural awareness skills, and last but not least, focusing on self-care.

One of the biggest mistakes a new case manager can make is assuming that because they are not directly working at the bedside, the work will not be as stressful. Novice nurses often need training and support from their facilities upper management, the nursing staff, and fellow case managers (Powell, 2003, p. 469). Case managers are expected to be big multi-taskers and because of this, using a team concept approach can help combat some of the difficulties and hardships that may arise during a particular case. Anne Llewellyn, RNC, BHSA, CCM, the cofounder of Professional resources Management Education in Florida, stresses that working in a team with another case manager is effective because each person brings something valuable to the table. Also Kathleen Lambert JD, RN, who has practiced Nursing for 31 years and has been a health care lawyer for 10 years, has spoken on legal issues affecting case managers at the 7th annual Hospital case manager conference in Atlanta. She believes that using the team concept technique is advantageous for the patient as well as the CM. It is also beneficial to work with another nurse whose skills and temperament are similar to your own. The reason for this is having more insight. More insight is given in terms of meeting the needs of the patient, and it can help speed up the process of completing the case while reducing the fragmented work that often occurs in dealing with multiple cases at a time. She states “once a team approach is established with one patient, it is easy to use the same approach with another patient because the rhythm is already there”. Developing a circle of mentorship with colleagues to turn to for advice and feedback is essential for all case managers, but especially for those who are new to the field (J. Bowman, 2007, pg 2).

The second technique to reduce stress that a CM might find helpful is finding ways to be more organized and learning time management. A useful way to become organized in dealing with each case is by “Calendaring”, a technique Kathleen Lambert believes in. She said she would often work on her cases backwards, starting with an end date and then organizes and set deadlines on a calendar (p. 4). She feels this gives her structure for what needs to be done from case to case. Since organization goes hand in hand with time management, the more organized a CM becomes, the less strapped for time he or she will be for completing case. There is usually a lot to be done in a set time frame, so if a CM lays out all the cases at once and focuses on what CAN be done for the day instead of what SHOULD be done, a lot less time will be wasted and more will be accomplished. For instance, Ellen Mitchell, a CM at Saint Vincent’s Hospital and Medical Center in NYC says that when she begins her day, she looks at the census for the unit and makes a list about what the patients requires for that particular day (p. 4). Working on a day to day basis with the “to-do-list” approach, gives her more organization, helps her manage her time more efficiently, and makes tasks easier to accomplish. Prioritizing and flexibility goes hand in hand with being organized; and because a case manager’s job can change at any moment, especially if a patient’s condition takes a turn for the worse, he or she must learn how to respond and adjust accordingly. As stated before, a CM must prioritize her cases based on the patient’s diagnosis, what deadlines need to be met, and what tasks must be marked off the to-do-list.

Another technique to help reduce stress in case management is performing variance analysis. This entails identifying the problem in your case. The CM must have a clear description of the problem before trying to fix it. This one problem could have several parts to it, the idea here is to break down the issue into smaller fragments and try to identify the common factor that could be causing this trickle down effect (Powell, 2003, p. 472). Breaking things down allows a CM to collect more data, and gather further facts that can help with solving the main issue. Along with variance analysis comes focusing on desired outcomes. If a CM sets long and short-term goals for his or her cases, they will know what limitations must be overcome whether it be social, financial, insurance support, or patient/family capabilities in continuing care outside of the health care institution. Knowing what the strengths and limitations of the case are can help the CM navigate the case more easily and getting the desired outcome they are hoping to achieve (Powell, 2003, p. 490).

As with many professions in the health care field, delegation is a technique that can help to reduce stress while decreasing some of the workload. Sometimes, we as people tend to want to do things on our own, but unfortunately, it is impossible to be everything and everyone at the same time in order to meet patient needs. A CM may find that a patient needs a minister, social worker, or any variety of ancillary services; he or she should be conscious of these needs and delegate them to the appropriate source (Powell, 2003, p. 475). When delegating any responsibility, there are a few standards that can minimize risks to the patient, and they involve acting in a responsible and prudent manner. This means tasks must be assigned within a person’s scope of practice, while providing supervision to the person carrying out the delegated tasks. It is important for the CM to distinguish their responsibilities from those that can and cannot be delegated, always keeping in mind the best interest of the patient (Powell, 2003, p. 475).

Another important aspect in working in the healthcare field that should always be considered is cultural awareness. It is the foundation of communication that involves the ability to stand back from ourselves and become aware of our cultural values, beliefs, and perceptions (google.com). Cultural awareness is important in a case managers job because practicing with cultural competence requires that the CM be aware of their cultural/ethnic values and refraining form imposing them on their patients. As stated before, it is the foundation of communication, and if communication is blocked, so is the adequacy and provision of care. It is the Case Managers job to learn and be familiar with their patient’s culture and not base care on assumptions and stereotypes. “A persons cultural identification is a powerful factor that must be considered in all aspects of interaction and intervention”(C. Griggs et al, p. 6). Mistakes can be made when care providers assume that they know a person based on previous interactions with someone of the same cultural or regional background. For example, with Hispanics, some words in one Spanish dialect can mean something different in another. A CM must be open to asking questions in order to recognize these differences when providing services. This opens communication and makes giving and receiving care easier for both the caretaker and care receiver. As mentioned by C. Griggs, C. Heier, G. Boyd, “Cultural differences must be understood, accepted, and incorporated in all aspects of the case management process” (pg 21).

Last but not least, one of the most important techniques of problem solving to reduce stress for a case manager is focusing on self-care. As a care provider, case managers often spend a great deal of time focused on meeting the needs of the patient and their families, and in turn do a poor job of taking care of themselves. It is easy to become emotionally vested in a case, but this is how compassion fatigue and work burnout occurs (Bowman, pg 2.). Case managers must find ways to de-stress and prevent illness to themselves. They can do this by participating in exercises, meditation, yoga, or taking on a hobby that is not work related, creating a balance between personal and professional activities, using vacation time, and paying attention to eating and sleeping habits, and not neglecting spiritual life. Lambert states, “one of the most important things in my life is my spiritual life and I think when you neglect that, you lose a wonderful means of dealing with stress.” (p.6).

Being a case manager can be a very demanding occupation, involving dealing with multiple medical cases, insurance companies, hospital policies, all while keeping the patient and their families happy. Even though a CM might find that the pros essentially outweighs the cons, and the reward of helping your patient feels better than the stress that comes with it; it is important to know that living as stress free as possible is the key to performing the job optimally. Doing good and feeling great goes hand in hand, so learning these problem-solving techniques to help reduce stress can ensure that safe and effective care for all parties involves is accomplished.

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