

# Case Management Notes

<b>Client information</b>	
<b>Name:</b> Marcus Holbrook	<b>Date of birth:</b> 09/22/2988
<b>Contact information:</b> 555-0187, marcus.holbrook@email.com	
<b>Emergency contact:</b> Alicia Holbrook (sister), 555-0192	
<b>Case information</b>	
<b>Case ID:</b> CM-2024-0415	<b>Date opened:</b> 04/15/2024
<b>Case manager:</b> Tara Simmons, LCSW	
<b>Purpose of visit:</b>	
Initial assessment for substance abuse treatment referral	
<b>Subjective</b>	<b>Objective</b>
<ul style="list-style-type: none"><li>- Client reports drinking "about a six-pack a day" for the past 3 years</li><li>- States he wants to quit but has been unsuccessful on his own</li><li>- Expresses concern about potential job loss due to decreased performance</li><li>- Reports feelings of shame and isolation from family</li></ul>	<ul style="list-style-type: none"><li>- Appears disheveled and fatigued</li><li>- Slight hand tremors observed</li><li>- Oriented to person, place, and time</li><li>- BAC at time of visit: 0.06</li></ul>
<b>Assessment</b>	<b>Plan</b>
<ul style="list-style-type: none"><li>- Alcohol Use Disorder, severe</li><li>- At risk for alcohol withdrawal</li><li>- Impaired social and occupational functioning</li><li>- Motivated for treatment but lacks support system</li></ul>	<ol style="list-style-type: none"><li>1. Refer to local intensive outpatient program (IOP) for alcohol abuse</li><li>2. Provide information on local AA meetings and encourage attendance</li><li>3. Conduct brief motivational interviewing to reinforce commitment to change</li><li>4. Schedule follow-up appointment in 1 week to assess progress and address any barriers to treatment</li><li>5. Provide crisis hotline number and educate on signs of severe withdrawal</li><li>6. Explore possibility of involving sister as support person in treatment process</li></ol>

# Example Case Management Notes

**PT Brinkman**



## **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

**BOOK ALONE: THE CASE MANAGER'S HANDBOOK 5E** Catherine M. Mullahy, 2013-06-20

**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 Education Collaborative University of Arizona

### **Nursing**

**Administration Handbook** Howard S. Rowland, Beatrice L. Rowland, 1997 This handbook presents the concepts of the administrative process as applied to the administration of healthcare delivery The purpose of the book is to provide a roadmap for nurse administrators to use as they negotiate their way through an increasingly complex and evolving field It is a text and a hands on reference Texts such as this are needed and authors objectives are met The book is a text for students and handbook for nurse executives My judgment is that it is for graduate students and beginning managers for the most part The authors are credible given it is their fourth edition of the book The illustrations include tables and examples of management tools that serve to highlight important points in the text References are mostly from the early to mid 1990s with some of the older more historical references The table of contents is thorough and easy to use This book covers thoroughly the concepts incorporated in the nursing administration domain The framework for organizing the chapters is an acceptable framework but not one I prefer The book is useful and the tables and examples are helpful I would recommend its use as a basic reference for graduate students in nursing administration

*Experiential Learning and Internship for Undergraduates* Abigail O. Akande, Michael B. Lavetsky, Stacey Conway, 2024-10-08 This textbook is a comprehensive and sequential guide designed specifically for undergraduate students entering internships in the human services field and for the faculty serving as their internship supervisors With a strong focus on career development and self exploration it builds understanding of the theoretical knowledge and core competencies needed for practical clinical experience in a variety of human services positions such as rehabilitation social work case management counseling and criminal justice Through a variety of exercises and activities in an effective workbook format this book assists student interns in developing a better sense of self in relation to their career readiness and helps them to identify career paths in the human services field It goes on to support them in developing the soft skills necessary to navigate professional careers and gives guidance on how to secure undergraduate

internships in the human services field The book focuses on how to develop the tools needed to succeed from counseling skills case management and crisis management to ethical conduct multicultural considerations self care legislation and working under supervision It is accompanied by downloadable versions of all the exercises and activities which will be available for instructors using this book as a course text By targeting the career exploration content that is vital in the experience of undergraduates who are seeking professions in such a broad human services field it will be essential reading for students at this level It is also a valuable resource for internship or practicum instructors in undergraduate programs with a focus on rehabilitation human services social work psychology criminal justice and other related helping fields

**Writing for Social Work** Lucy Rai,2021-02-03 Writing is an important skill not just for a social work degree but also as an integral part of practice Social workers need to be able to write effectively in a range of formats for different contexts Equipping students with guidance on both academic and assessed writing and writing in social work practice this book will use case studies and examples to develop their ability to plan and respond to the challenges of new and familiar writing tasks

**Restoration & Management Notes** ,1993 **Potter and Perry's Fundamentals of Nursing: Second South Asia Edition - E-Book** Suresh Sharma,2017-07-25 Fundamentals of Nursing by Potter and Perry is a widely appreciated textbook on nursing foundations fundamentals Its comprehensive coverage provides fundamental nursing concepts skills and techniques of nursing practice and a firm foundation for more advanced areas of study This Second South Asia edition of Potter and Perry s Fundamentals of Nursing not only provides the well established authentic content of international standards but also caters to the specific curriculum requirements of nursing students of the region SALIENT FEATURES Fully compliant to the INC curriculum Easy to read interesting and involving disposition which leads the reader through various facets of nursing foundations fundamentals Improved layout design and presentation A number of photographs replaced with the Indian ones to provide regional feel to the content Long Answer and Short Answer questions added at the end of every chapter *Law Notes* ,1904 *Ruling Case Law* ,1929 **The Journal of Accounting Case Research** ,1995 *New York Court of Appeals. Records and Briefs.* New York (State)., **Rough Notes** ,1909 A journal devoted to insurance and the industries *S.A.M. Advanced Management Journal* ,2003 *Hospital Management* ,1920 **Ruling Case Law** William Mark McKinney,Burdett Alberto Rich,1916 *The Institutes of Justinian. With Harris's Version Condensed, and Notes by T. Cooper. Second Edition* Justinian I (Emperor of the East),1874 *Nursing Notes* ,1891

**Junius: Including Letters by the Same Writer, Under Other Signatures (now First Collected). To which are Added, His Confidential Correspondence with Mr. Wilkes, and His Private Letters Addressed to Mr. H. S. Woodfall. With a Preliminary Essay, Notes, Facs., Etc** Junius II,1875

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