

Core Function #7 Case Management

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IC & RC defines CASE MANAGEMENT as:

Activities intended to bring services, agencies, resources, or people together within a planned framework of action toward the achievement of established goals. It may involve liaison activities and collateral contacts.

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TAP 21 includes the core function of Case Management in Domain IV, Service Coordination and it incorporates 3 elements: Implementing the Treatment Plan; Consulting; and, Continuing Assessment and Treatment Planning.

The function of CASE MANAGEMENT is administrative support of the client's therapeutic goals. CASE MANAGEMENT is the coordination of activities and services for a client in order to facilitate the positive outcome of the treatment plan thus helping the client meet individual goals. Coordination implies the involvement of more than one person in making sure that plans are carried out successfully.

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In managing the case of a client, a counselor may use consultation and referral core functions. However, CASE MANAGEMENT, is more than either of those functions individually. To describe consultation or referral as CASE MANAGEMENT is mistaken. CASE MANAGEMENT is the comprehensive coordination of all aspects of the client's treatment plan.

CASE MANAGEMENT activity begins with the initial treatment plan and continues throughout treatment all the way to discharge and then any transitional care (aftercare/continuing care).

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In some larger agencies the function of CASE MANAGEMENT is assigned to a case manager; however, in most agencies each client's individual counselor provides the case management.

Throughout the treatment process, a counselor is required to explain to the client what is happening, to orient the client to the program, explain the treatment plan, explain the rationale for various consultations and referrals, explain the need to obtain written permission for the release of confidential information, and to explain the rationale for CASE MANAGEMENT.

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From the Client's Point of View

To a client, CASE MANAGEMENT is one of those functions taken for granted.

Most clients are aware that their case is being managed but they do not need to fully understand the process.

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From the Counselor's Point of View

A counselor needs to realize that he or she is responsible for the client's care. The idealized goal for all treatment is to have the client not experience any ongoing problems with substance use. How this is accomplished is the essence of case management. It is the coordination of all the activities brought together to reach this idealized goal.

In other words, success in treatment relies heavily on CASE MANAGEMENT and getting the right services to the client at the right time. CASE MANAGEMENT is time sensitive. Thus, a counselor must know when during the treatment process specific activities are most likely to be successful.

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Global Criteria:

28. Explain the rationale of CASE MANAGEMENT ACTIVITIES TO THE CLIENT.

To be competent in this criterion, a counselor :

- *Understands that the explanation for case management services is given to the client, briefly stating the rationale, and answering any client questions.*

As an example of one case management activity in this global criterion, Victoria could say to Leslie, "Leslie, we've identified your need to furthering your education as a goal. At this time I'd like to coordinate a meeting with you and a representative from the community college so that you can understand what is required and to begin that process."

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Global Criteria:

29. Coordinate services for client care.

To be competent in this criterion, a counselor :

- *Knows how to explain and describe how client services are coordinated and then actually doing the coordination.*

Competence is displayed by understanding and implementing the traditional who, what, when, where, and why questions. Who does the counselor coordinate with ? Who needs coordinated? When, during the treatment process, is the coordination completed? Where is the coordination completed? Why is there a need for the coordination of services? A counselor should be able to answer each of these questions for each client on his or her case load.