

Medical Case Management: Overview of a National Training Curriculum



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Today We Will

- Summarize the implementation of the Ryan White HIV/AIDS Program (RWHAP) medical case management (MCM) service category by the HIV/AIDS Bureau (HAB) and its grantees
- Provide a brief overview of the MCM curriculum development project
- Review the training curriculum
- Provide a brief tour of the training module designed for Part A and Part B grantees
 - Managing the MCM System



Defining Medical Case Management

HAB's MCM Definition: 2010

- **MCM services must be provided by trained professionals, including both medically credentialed and other health care staff who provide a range of client-centered services that result in a coordinated care plan which links clients to medical care, psychosocial, and other services**
- **These services ensure timely and coordinated access to medically appropriate levels of health and support services and continuity of care, through an ongoing assessment/reassessment of the client and other key family members' needs and personal support systems.**
- **MCM may also include the provision of treatment adherence counseling to ensure readiness for, and adherence to, complex HIV/AIDS treatments.**

HAB's MCM Definition: 2010

■ Key MCM activities include

- Initial assessment of service needs
- Development of a comprehensive, individualized care plan
- Coordination of services required to implement the care plan
- Continuous client monitoring to assess the efficacy of the care plan
- Periodic reevaluation and adaptation of the care plan, at least every six months, as necessary during the enrollment of the client



MCM Training Assessment and Curriculum Development

Medical Case Management Project

- **In response to the challenges experienced by grantees and providers funded by the Ryan White HIV/AIDS Program, Abbott Pharmaceutical Products Division funded Positive Outcomes, Inc. (POI) to:**
 - **Conduct a national assessment of the training needs of HIV case managers in adopting MCM techniques**
 - **Ascertain challenges in conducting MCM**
 - **Identify and learn from HIV MCM training efforts across the US**
 - **Develop and test the MCM curriculum at the HIV and Social Work Conference, Northern Virginia, Orlando EMA, Jacksonville TGA, Minnesota, Western Pennsylvania**

Medical Case Management Project

- **Concurrently, HAB funded POI to design a training program on eligibility determination (ED) and by several Part A grantees to assess the quality of MCM**
 - **The ED curriculum was tested in Chicago and a basic training session was recorded by the Care Foundation**
- **The curriculum will be posted on the POI website and made available to grantees and AETC performance sites to supplement their own CM efforts**
 - **In mid-September, the curriculum will be posted on the POI website, along with trainer notes, group exercises, case studies, and related materials**

Curriculum Features

- **Designed to be flexible to reflect local standards of care and performance measures, and program policies**
 - **Trainees are reminded that grantee requirements must be adhered to**
- **Medical case managers are assumed to have basic case management skills and knowledge of HIV disease and clinical management**
- **Tools are offered, including web-based resources, to supplement the curriculum**
 - **Examples include medical terminology, reading and interpreting laboratory reports, HIV medications**

Curriculum Features

- **Designed for both MCM supervisors and medical case managers**
- **The curriculum is organized in modules and can be used in a variety of training formats**
- **A train-the-trainer strategy is applied with trainer notes accompanying the PowerPoint slides**
- **Templates are provided to develop locally-relevant resource materials**
 - **Web links to resource guides, key State and local insurers, health care providers, and support service agencies**

Curriculum Features

- **Case studies are used throughout the curriculum to reinforce the materials**
 - **Individual and group exercises**
- **With funding from the Harris County EMA, an MCM chart review tool was designed to identify areas of performance improvement to be addressed by the curriculum**
- **Designed to be adopted by states interested in certification of medical case managers**

What do MCMs need to know?

■ Need to Know: Basic

- Case management processes: intake, assessment, care planning, referral, and care coordination
- Medical terminology
- How to read and understand medical records
- Chart documentation
- “Science” of HIV disease, its manifestations over time, and unique presentation in sub-populations
- Other chronic conditions commonly experienced by HIV+ clients
- Diagnostic and monitoring tests, including how to read and interpret lab data
- HIV medications and their common side effects
- Substance abuse and mental health counseling

What do MCMs need to know?

■ Need to Know: Intermediate

- Interview and assessment skills that go beyond the Ryan White Program
- Eligibility determination and benefits coordination techniques
- Care plan development and implementation skills that addresses clients' clinical *and* psychosocial needs
- Behavioral intervention techniques (e.g., motivational interviewing)
- Roles and responsibilities of the “players” on the health care team

• **MCM System**

• **Care Team**

Care Seeking,
Treatment and
Appointment
Keeping
Adherence, and
Behaviors

Enrollment in
Third Party
Health Insurance

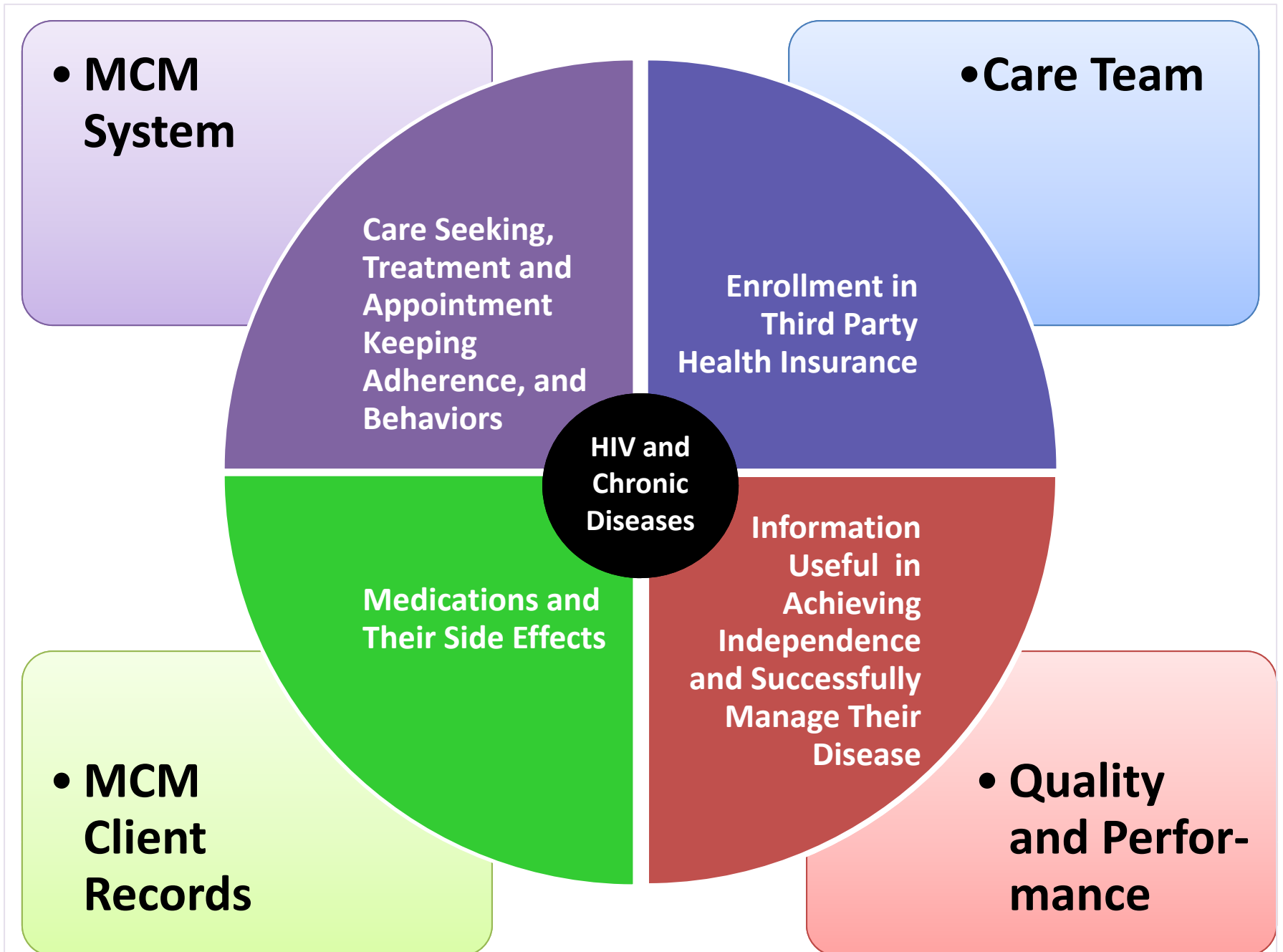
**HIV and
Chronic
Diseases**

Medications and
Their Side Effects

Information
Useful in
Achieving
Independence
and Successfully
Manage Their
Disease

• **MCM Client Records**

• **Quality and Performance**



Eligibility Determination Modules

- **Rationale for conducting ED**
- **Federal requirements for ED**
- **Components of the ED cycle**
- **Collecting ED data**
- **Health insurance, income maintenance, and other sources of services for HIV+ clients**
- **Assessing income, household size, and other client/family resources**
- **Effective ED: Lessons learned from Ryan White Program-funded agencies**

Eligibility Determination Modules

- **Partners in effective ED**
- **Documenting eligibility for the Ryan White Program and other funded services**
- **Components of model ED policy and procedure manual**
- **ED staffing**
- **Performance measurement**
- **Case presentations**

Managing the MCM System

- **Module designed for Part A and Part B grantee staff**
 - **Orientation to MCM**
 - **Roles and responsibilities of medical case managers in the HIV care continuum**
 - **Roles and responsibilities of grantees to ensure high quality, coordinated MCM**
 - **Methods for coordinating MCM and other HIV services**
 - **Measuring MCM performance among medical case managers and supervisors**
 - **MCM care standards and conducting quality assessment**
 - **MCM reimbursement models**