

# Chapter XXI

## Case Management: The Global Emergence of a Contemporary Practice

**Dana Deravin Carr**  
*Jacobi Medical Center, USA*

### ABSTRACT

*This chapter introduces case management as a principal cornerstone in the delivery of cost effective, quality healthcare. Since the advent of modern healthcare initiatives, case management design and structure has been consistently applied in healthcare practice across the continuum: horizontally, vertically, nationally, and internationally. Moreover, its strategies have been practiced successfully in the care of people, ill and healthy, in areas of public health, behavioral health, long term care, rehabilitation, medicine, nursing, and social work. Through identification and definition of its principles and standards of practice, and through discussion of the role and function of case management professionals, the author hopes to demonstrate that the implementation of such strategies can optimize the success of clinical operations and help ensure fiscal viability in the global healthcare marketplace.*

### INTRODUCTION

A principal construct in the architecture of successful health care practice and delivery, **Case Management** is an ever-evolving field that encompasses a variety of patient centered models of care delivery and is practiced by a host of multidisciplinary health care professionals. The foundations of case management have been well established in the practice of nursing and its

contributions to the health care industry have served to advance patient care. However, this inventive approach to managing, coordinating, facilitating, and expediting patient care is neither new nor is it exclusive to the practice of nursing (Tahan, 1998).

Owning more than a century's worth of history, a review of salient literature shows that case management is a derivative of creative health care efforts attributed to different disciplines,

which include nursing, medicine, behavioral health, public health, and social work (Tahan, 1998). While professional backgrounds and areas of specialization may vary, the practice of case management integrates the principles and goals of health care delivery for each of the disciplines that undertake this advanced practice.

Today, case management initiatives are essential to the delivery of quality based, efficacious, and cost-effective health care. Its practice penetrates the health care continuum horizontally, vertically, and geographically and contemporary case management is currently practiced in every setting, i.e., community and long-term care; acute, sub-acute, ambulatory care (out-patient clinics and emergency departments), behavioral health, home health, and even by managed care organizations.

**Internationally**, health care delivery systems are uniquely diverse, i.e., the socialized medicine model, which is the pillar of health care delivery in Australia, Europe and the United Kingdom vs. the fee-for-service and managed care models that are characteristic of the United States health care industry. The case management construct however, is a bridge that promotes continuity and integration within these diverse systems by linking its core principles, goals, and strategies to the global health care delivery process. As a result of this ability to link and positively impact health care practice, finance and quality, case management as a role and function is gaining ground globally.

**The Case Management Society of America**, revised Standards of Practice, 2002, defines Case Management as:

*A collaborative process of assessment, planning, facilitation, and advocacy for options and services to meet an individual's health needs through communication and available resources to promote quality cost effective outcomes. (CMSA, 2002)*

In Canada, the Ontario Case Managers Association (OCMA) is the only Canadian association to develop case management standards. The Ontario Case Management Association and Ontario Community Support Association defines case management as:

*A collaborative service consisting of interrelated processes to support clients and their efforts to achieve optimal health and independence in a complex health, social and fiscal environment. (Berube, 2004)*

Case management is defined in an Australian mental health service context as:

*The role of drawing together into one coherent system all services necessary to meet the needs of the service user, whether in the community or in the hospital. This includes meeting the needs for psychiatric or physical treatment, family and social relationships, basic survival needs like food, safe accommodation, employment, leisure, cultural and spiritual needs. (Rosen and Teeson, 2001)*

The global evolution and culturally diverse marketplace of case management practice supports the importance of offering our readers the opportunity to avail themselves of online translations that support their own cultural definition of case management as a practice. As an example, definitions of case management are so noted in Spanish, German and Italian:

- **Spanish:** La gerencia del caso es un proceso de colaboración del gravamen, del planeamiento, de la facilitación y de la defensa para que las opciones y los servicios resuelvan las necesidades de la salud de un individuo a través de la comunicación y de recursos disponibles de promover resultados rentables de la calidad. <http://www.ap->

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