

Nursing Case Management: A Successful Non-APRN Entry-Level Master's

Fusae Kondo Abbott, DNSc., RN
Janet Rowland, EdD, MSN, RN-BC, ACM-RN
Lisamarie La Vallee, MSN, RN, ACM-RN



Samuel Merritt University

Mission

Samuel Merritt University educates students to become highly skilled and **compassionate healthcare professionals who **positively transform** the experience of care in **diverse communities.****

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SMU at a Glance

- **1909**, enrolled first class of 18
- **1981**, transitioned from Diploma School of Nursing to a baccalaureate degree-granting institution
- **1996**, began to offer ELMSN-CM
- **2017**, prepared the most NCLEX-eligible graduates in California (about 600)
- **2018**, offers 13 specialty health science programs

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School of Nursing

(Fall 2017)

ABSN	287
BSN	250
RN-to-BSN	113
ELMSN— CM	104
ELMSN— FNP	173
CRNA	77
MSN— Post Professional CM	3
MSN— Post Professional FNP	34
MSN— Online (CM-9; FNP-170)	179
DNP	33
Total	1253

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Knowledge Check

How many MSN case management programs are there in the US?

A. < 10

B. > 20

C. > 30



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Case Management

- Collaborative process of assessment, planning, facilitation, care coordination, and advocacy
- Facilitation among the client & family, health team, and payer
- Helps patients understand & access quality, efficient healthcare

Top 5 Reasons to Become a CM

1. Case managers protect the vulnerable and provide a guide and advocate through the complex health care system
2. Being a good case manager requires excellent teamwork
3. The most exciting moments are when you brainstorm ideas with the MD, RN, RT, PT, SW to overcome discharge barriers



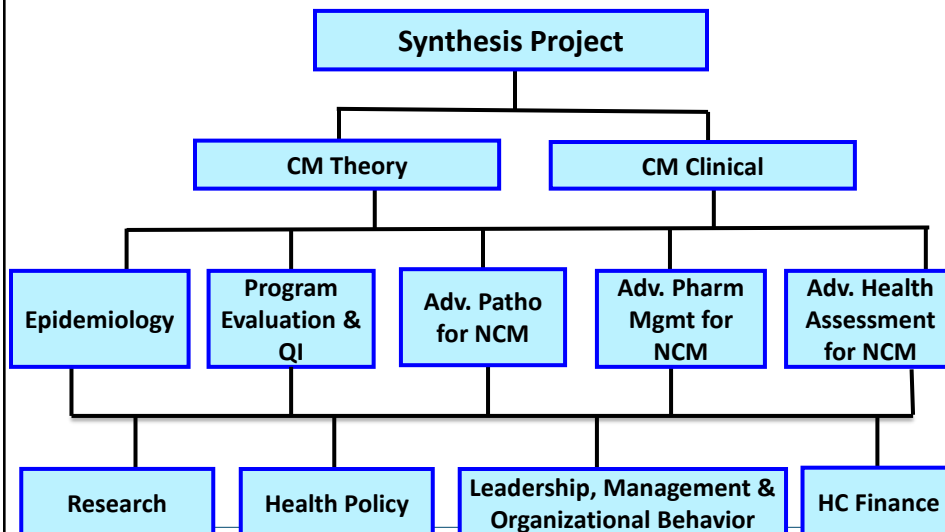
Top 5 Reasons to Become a CM

4. CM Departments are always looking to improve quality outcomes, processes, & standardizations. It's an ever-changing field, which keeps it exciting and never stale
5. Hospitals/institutions are recognizing the importance of case management & CMs are well-compensated for their job

Case Management Curriculum



Case Management Curriculum Structure



Foundation Courses

**N564 – Leadership, Management &
Organizational Behavior**

N601 – Research Methods

N602 – Analysis of Health Policy Issues

CM Core Courses

N603 – Epidemiology & Biostatistics

**N607 – Program Evaluation & Quality
Improvement**

N612 – Healthcare Finance

N624, N625, & N623/L – The 3P's Courses

The Three P's: Pathophysiology, Pharmacology & Physical/Health Assessment



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N624 Advanced Pathophysiology for Nurse Case Managers

Unique Features and Focus:

1. Assessment of clinical conditions & treatment plans through the lens of medical necessity & care coordination
2. Barriers to successful self-management
3. Individualized care coordination vs the FNP focus
4. Considerations for Medicare/Medicaid regulations

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N624 Advanced Pathophysiology for Nurse Case Managers

Methods of Instruction:

1. Pre-recorded voice-over PowerPoint lectures prior to class, review in class
2. Case studies (individual, partners, groups) - medical necessity, identifying potential barriers, & patient education
3. Discussion questions with peer responses
4. Athena Forum, Socrative, low-stakes quizzes & crossword puzzles

N625 Advanced Pharmacological Management for Nurse Case Managers

Unique Features and Focus:

1. Assessment of clinical conditions and related medication treatment
2. Barriers to successful self-management adherence to medication regimes
3. Individualized plan of care coordination vs the FNP focus

N625 Advanced Pharmacological Management for Nurse Case Managers

Unique Features and Focus:

4. Athena Forum Institute – Modules on pharmaceutical management of disease states
5. Community resources & outpatient case management observation experience

N625 Advanced Pharmacological Management for Nurse Case Managers

Methods of Instruction:

1. Pre-recorded, voice-over PowerPoint lectures prior to class and reviewed in class
2. Case studies - identifying potential barriers to medication management & patient education
3. Discussion questions with peer responses
4. Socratic, low-stakes quizzes & crossword puzzles

N623/N623L Advanced Health Assessment for Nurse Case Managers

Unique Features and Focus:

- 1. Holistic, systematic view of the patient & assessment – theories & models**
- 2. Transitions of care, coordination of services/resources/providers, community resources & end-of-life considerations**

N623/N623L Advanced Health Assessment for Nurse Case Managers

Unique Features and Focus:

- 3. Athena Forum Institute – CM modules on transitions of care, professional identity, & end-of-life issues**
- 4. Standardized Patient (SP) Encounters – Formative & Summative assessments**
- 5. Intercultural Development Inventory**

N623/N623L Advanced Health Assessment for Nurse Case Managers

Methods of Instruction:

- 1. Pre-recorded, voice-over PowerPoint lectures prior to class with review in class**
- 2. Speakers from interdisciplinary team (PT, SWS)**
- 3. Case studies – (role play between case managers & patients/families)**
- 4. Discussion questions with peer responses; low-stakes quizzes, Socrative**

Standardized Patient Encounters



Case Management Program



CM White Coat Ceremony

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Theory and Practice



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N620 Case Management Theory

Unique Feature and Focus:

- 1. Acute Care ; Transition Planning; Coordination of Care, Disease Mgmt, Health Education**
- 2. Independent Practice; Worker's Comp; Third Party Administration**
- 3. Risk Mgmt; Compliance; Emerging Trends**
- 4. Legal & Ethical Issues**
- 5. Intracultural Conflict Style Inventory**

N620 Case Management Theory

Methods of Instruction:

- 1. Voice over PPTS prior to class**
- 2. Class review & discussion of material**
- 3. Student-led seminar**
- 4. Guest Speakers from Service Sector**

N620L Case Management Clinical Practicum

Preceptorship:

1. Clinical Hrs:
225 hrs
at various settings
2. Clinical seminar:
15 hrs -
one hour/week (school)



N620L Case Management Clinical Practicum

Preparation for Preceptorship:

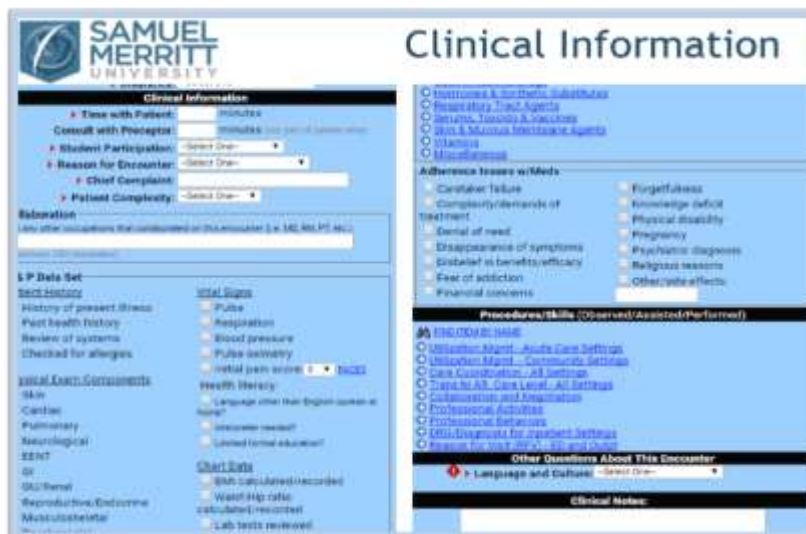
1. Resume
2. Plan of clinical practicum (goals & objectives)
3. First meeting: student, preceptor (CM Manager),
& clinical faculty
4. Clinical Activities
 - a. Documented in Typhon
 - b. Progression to competency
 - c. Case Studies/Life Care Plans
5. Approximately 100 sites

Typhon

Student Clinical Tracking System:

1. Clinical Activities Database
2. Web-based
3. Contains no PHI
4. Students log all patient encounters
5. Searchable database & reports

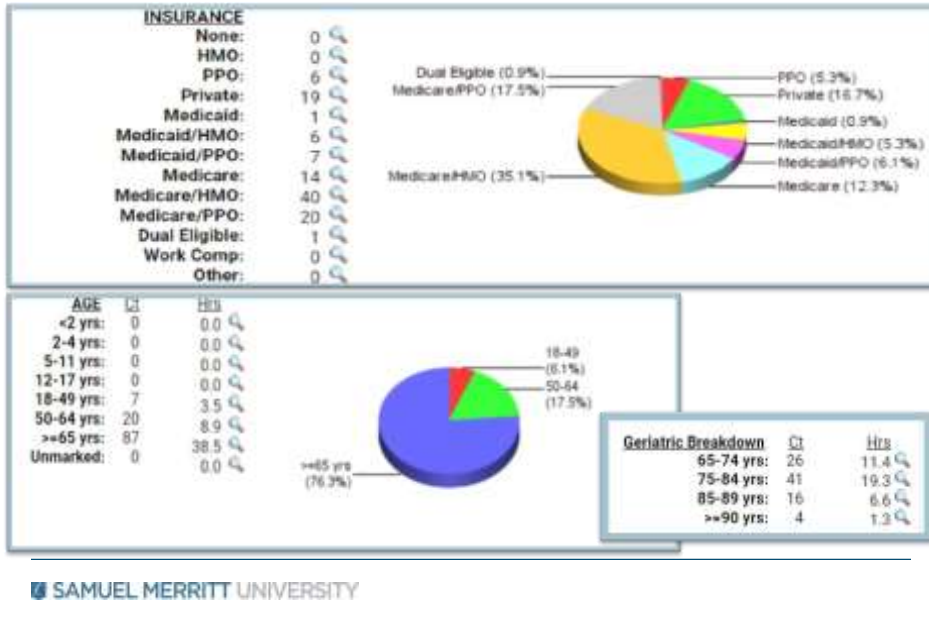
Typhon Case Logs



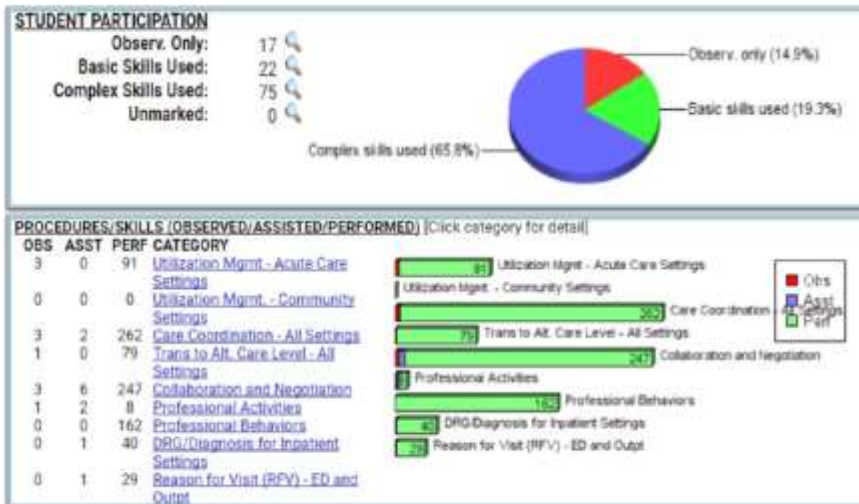
The screenshot displays the Typhon Case Logs interface, which is a web-based system for tracking clinical activities. The interface is divided into several sections:

- Clinical Information:** This section includes fields for "Time with Patient" (minutes), "Consult with Preceptor" (minutes), "Student Participation" (dropdown menu), "Reason for Encounter" (dropdown menu), "Chief Complaint" (text input), and "Patient Complexity" (dropdown menu).
- Information:** A section for entering additional information, with a note that only information consolidated on the Associate's e.g. M.D. M.P.T. etc. is recorded.
- S/P Data Set:** A section for entering patient data, including "Start history" (checkboxes for History of present illness, Past health history, Review of systems, Checked for allergies), "Social Exam/Concomitants" (checkboxes for Skin, Cardiac, Pulmonary, Neurological, ENT, GI, GU/renal, Reproductive/Endocrine, Musculoskeletal), "Vital Signs" (checkboxes for Pulse, Respiration, Blood pressure, Pulse oximetry, mental exam score), "Health History" (checkboxes for Language other than English spoken at home, Interpreter needed, Limited formal education), and "Chart Data" (checkboxes for BUN calculated/recorded, Waist/Hip ratio calculated/recorded, Lab tests reviewed).
- Clinical Information (Right Panel):** A list of clinical information categories, including "Institutions & facilities", "Reasons for referral", "Diagnosis", "Adherence issues w/meds", "Procedures/skills", and "Other Questions About This Encounter".
- Other Questions About This Encounter:** A dropdown menu for "Language and Culture".
- Clinical Notes:** A section for entering clinical notes.

Typhon Reports



Typhon Reports



CM Synthesis - Capstone Project



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Synthesis Projects

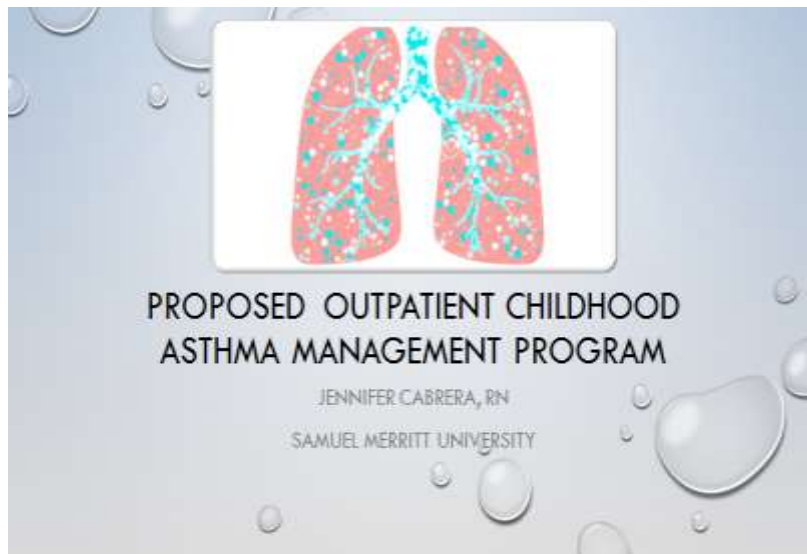
1. Development of a CM or DM program
2. Development of an interdisciplinary CM tool
3. Development of a CM process
 - a. A cost-effective & efficient CM process within an acute care setting;
 - b. Or in the transition from one level of care to the next level of care
4. Development of a special project

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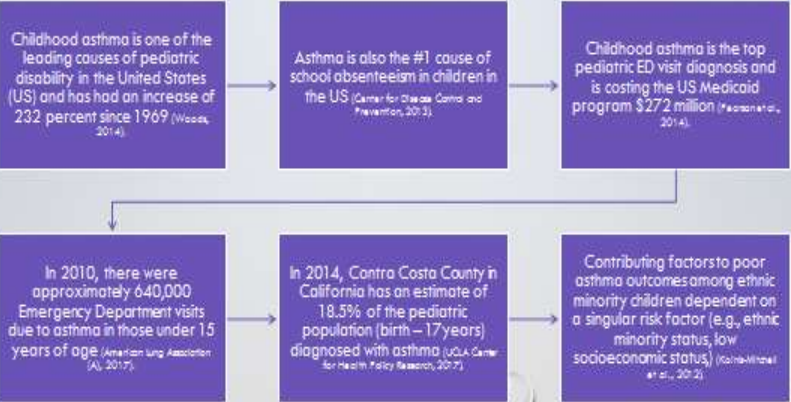
Synthesis Projects

1. Disease Management of Community-Dwelling Patients with Heart Failure
2. Case Management in the NICU: Improving Safe Discharge
3. Telephonic Case Management for End-Stage Congestive Heart Failure
4. Transition to Rehabilitation: A Case Management Process for Traumatic Spinal Cord Injury
5. A Case Management Program of Medication Management for Community-Dwelling Filipinos

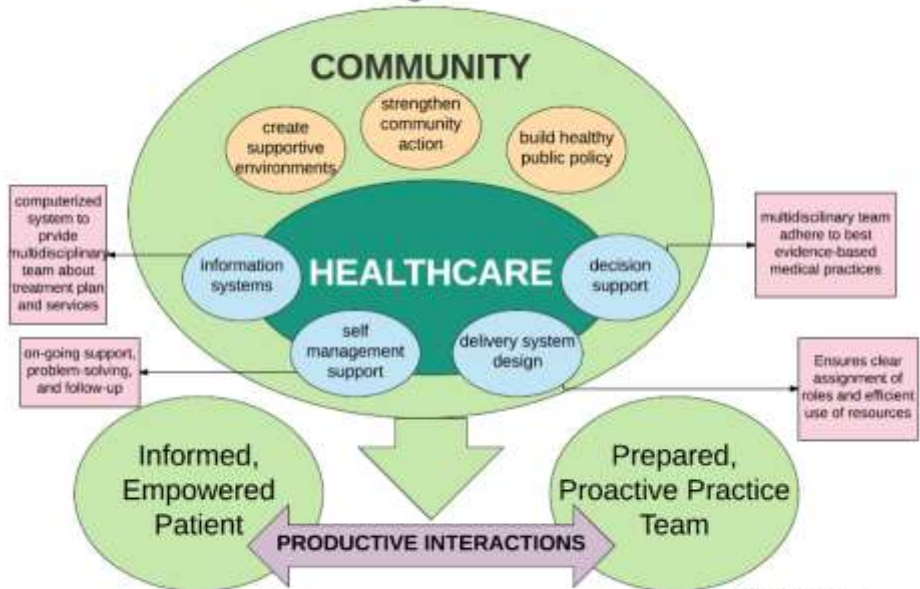
Student Synthesis Work



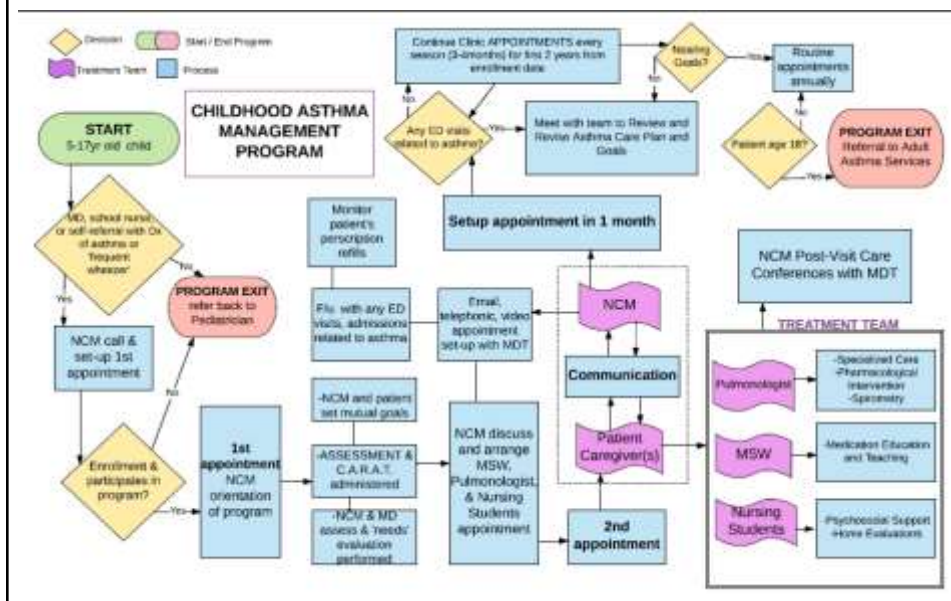
ISSUES & SIGNIFICANCE



Case Management Model



Flowchart



Program Evaluation

STRUCTURE	INDICATOR	INSTRUMENT/MEASURE	GOAL
Enrollment	Referrals to program or self-enrollment with a diagnosis of asthma	# of children with asthma that are enrolled	Enrollment >60% with less than 20% drop-out rate
Multidisciplinary staff education	Knowledge on current practices for children with asthma	Continuing education, pre- and post-test	Score of >80%
Multidisciplinary staff competency	Training appropriate to their specialty	Licensure, Certifications, Credentials, Continuing Education	100% competent staff
PROCESS	INDICATOR	INSTRUMENT/MEASURE	GOAL
Patient participation in the program	Attendance to appointments, response to telephone calls or emails	History of appointments, calls, emails and NCM Progress Notes	> 80% enrollment with 75% maintaining participation till age 18
Ongoing assessments to patient and caregiver(s) to evaluate knowledge on asthma disease process, triggers, nutrition, and medication management	Continuous signs of improvement in understanding asthma for them/their child	Assessment provided during follow-up meetings and NCM Progress Notes	Knowledge assessment score of >80%
NCM following up with patient and caregiver(s) with monthly telephone calls	Progress Notes	Call logs, NCM Progress Notes	Follow-up > 90%
Quality of Life (QOL)	Outcomes/changes while enrollment in program	QOL patient / caregiver(s) survey	>80% QOL improvements
School absenteeism	School attendance	School record by semester/term	5% or less school days missed per school year
Multidisciplinary team Care Conferences	Weekly Childhood Asthma Management Program rounds with multidisciplinary team	Multidisciplinary team attendance	100% attendance
ED visits	ED visits	EMR documentation encounters, NCM Progress Notes	33% reduction in 1 st year, following years 45% reduction
OUTCOMES	INDICATOR	INSTRUMENT/MEASURE	GOAL
Reduced pediatric ED visits in the Bay Area	ED visits	Hospitals and County Records	>80% reduction
Quality of Life (QOL)	Patient and caregiver(s) QOL post program	Patient QOL survey	>80% QOL improvements
Program satisfaction	Patient and caregiver(s) satisfaction	Satisfaction survey	Patient and caregiver(s) >90% program satisfaction
Overall school absenteeism related to asthma	School attendance	School attendance record after program	5% missed school days per school year

Knowledge Check

How many courses are in the CM Program Curriculum?

- A. 8
- B. 10
- C. 13
- D. 14



Collaboration with Service Sectors

Kindred Healthcare

In 2009, offered a Graduate Orientation Mentorship Program & conducted a study to evaluate the program



1. Data indicated that ELMSN new graduates could perform satisfactorily at entry-level CM work after orientation/mentorship
2. Educational needs of the new ELMSN graduates differed from experienced RNs entering the CM field
3. Graduates' characteristics/skills helped: positive and "can do" attitudes, "self-starters," flexibility, people skills, organizational skills, time management, ability to ask for help
4. Hired: 3 in 2010, 3 in 2011, 3 in 2012

Sutter Health

1. InterQual Training with McKesson through Sutter's license (since 2011)
2. Postgraduate CM Residency Program (2012 – 2014)
3. Career Fair, job interviews, hiring SMU students (since 2015)
4. Independent study course on utilization review
5. Research activities
 - a. Impact of the 2008 Pharmacy Therapeutic Benefit Change Implemented at SutterSelect in 2009.
 - b. Improving Transition from Hospital to Home in 2010
 - c. Factors Related to Re-hospitalization in 2015

Postgraduate CM Residency Program

1. Offered a 12-unit clinical course (4 days/wk over 15 weeks)
2. Enrollments: 2 in F12, 3 in S13, 4 in S14
3. Cost: \$9,000/St (\$4,000 stipend/St)
4. Results:
 - a. Students obtained CM jobs in Sutter Health
5. Lessons Learned:
 - a. Students needed more than \$1000/month
 - b. Graduates were getting CM jobs right after graduation

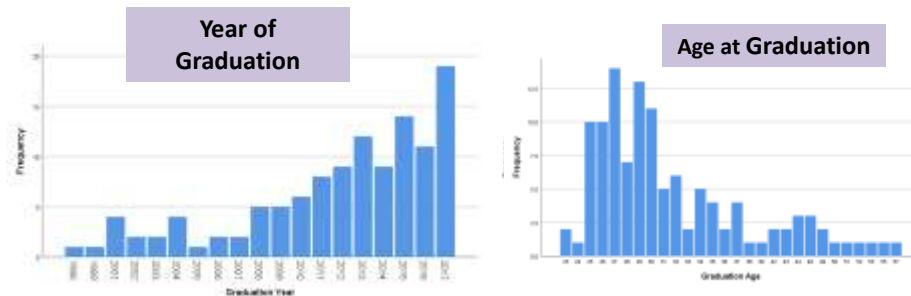


Off-Campus Work-Study Student Program

1. John Muir Physician Network (2011-2015)
2. Meritage Medical Network (since 2014)

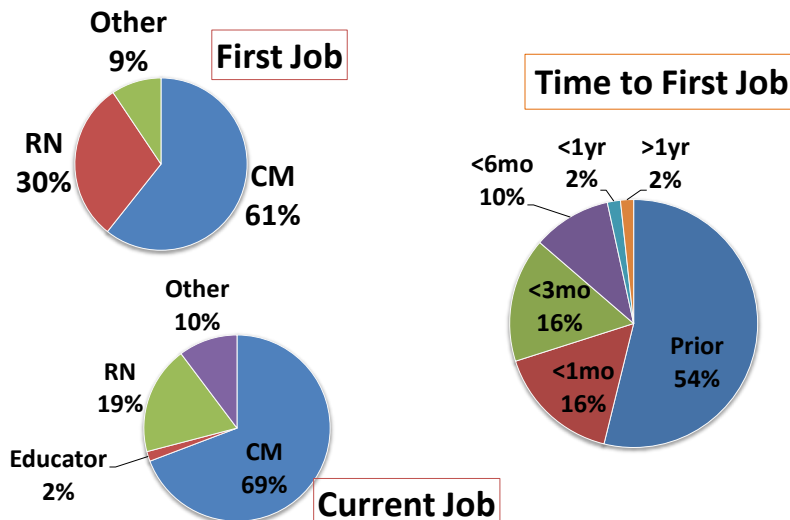
Alumni Data: Graduates & Response Rate

# of Admissions/year	44 ~ 48
Total # of Graduates (1998-2017)	412
Survey Responses	117
Survey Response Rate (of 393 sent successfully)	30%



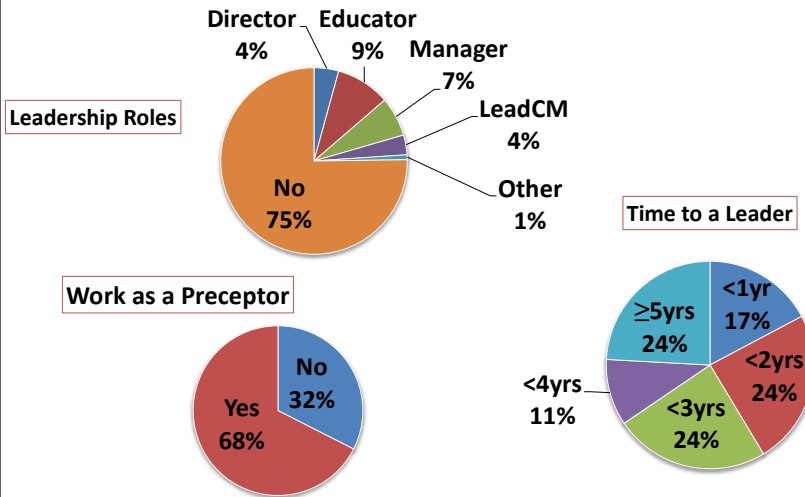
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Alumni Data: Jobs



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Alumni Data: Leadership



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Thank you! Questions?

