

# Case Management Society of America

SUPPORTING THE DEVELOPMENT  
OF CARE MANAGEMENT PROFESSIONALS



## About the Case Management Society of America

Founded in 1990, the Case Management Society of America (CMSA) has grown to be the leading non-profit association dedicated to the support and development of the profession of case management. It is based in Little Rock, AR, and serves more than 11,500 members, 15,000 non-member subscribers, and 75 chapters through educational forums, networking opportunities, legislative advocacy and establishing standards to advance the profession.

Its leadership programs, educational forums, and breadth of tools and resources enable case management professionals to ensure more positive outcomes for individual patients' healthcare needs. Case management professionals help patients get healthier, faster; and help curtail the exorbitant costs that too often afflict the nation's health care system. To further the professional knowledge and career opportunities of its members, CMSA also offers a number of education programs.

Ultimately, the quality and productivity of CMSA's services rely upon the commitment of its membership. Because case managers are effective communicators, problem solvers, and visionaries, CMSA offers an opportunity for members to utilize their skill sets and maximize their talents. The enormous success of the organization lies in one simple concept - professional leadership.

## What is a Case Manager?

### Definition of Case Management

Case management is a collaborative process of assessment, planning, facilitation, care coordination, evaluation and advocacy for options and services to meet an individual's and family's comprehensive health needs through communication and available resources to promote quality cost-effective outcomes.

### Philosophy of Case Management

The underlying premise of case management is based in the fact that when an individual reaches the optimum level of wellness and functional capability, everyone benefits: the individuals being served, their support systems, the health care delivery systems and the various reimbursement sources.

Case management serves as a means for achieving client wellness and autonomy through advocacy, communication, education, identification of service resources and service facilitation. Case management services are best offered in a climate that allows direct communication between the case manager, the client, and appropriate service personnel, in order to optimize the outcome for all concerned.

### GENERAL INFORMATION

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Email: [cmsa@cmsa.org](mailto:cmsa@cmsa.org)  
Website: [www.cmsa.org](http://www.cmsa.org)

Members: 11,500 individuals  
Chapters: 75 local chapters

Founded: 1990  
Managed By: CMI – Little Rock, AR

### PRODUCTS / SERVICES / EVENTS

- Individual Case Manager Memberships
- Company/Employer Memberships
- Corporate Partnerships & Sponsors
- Educational Resource Library (online CEs)
- CMSA's Career Center
- *Standards of Practice for Case Management*
- *Ethical Statement on CM Practice*
- *Case Management Adherence Guidelines*
- *CMSA Today™* magazine
- *Professional Case Management* journal
- Annual National Conference & Expo
- Public Policy Summit

### MEDIA CONTACT

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*Director of Communications*

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## The Case Management Profession

Case management is more important than ever before. Because of escalating costs, the aging of the population and other factors, better management of health care toward more cost-effective outcomes is a topic of conversation from local coffee shops to Capitol Hill. While case management isn't technically a profession in itself, it has evolved as a specialized area of practice and unifying factor within a number of medical professions: doctors, nurses, social workers, administrators and others. Case management professionals advocate for the needs of patients, assuring that individual cases are promptly attended to up and down the healthcare chain. Ultimately, the reward is a healthier population and a more affordable health care system.

## CMSA's Strategic Vision

"Case managers are recognized experts and vital participants in the care coordination team who empower people to understand and access quality, efficient health care."

## CMSA's Strategic Mission

The Case Management Society of America is the leading membership association providing professional collaboration across the health care continuum to advocate for patients' wellbeing and improved health outcomes through:

- Fostering Case Management Growth and Development
- Impacting Health Care Policy and
- Providing Evidence-Based Tools and Resources

## History of the Society

CMSA's emergence as the largest and oldest international, multi-disciplinary, non-profit organization dedicated to the support and development of case management professional is in large part due to its unique and involved membership. Innovation is used to continually mentor new leaders for national positions. CMSA has developed a leadership ladder, whereby local leaders progress in their scope of responsibility through appointed national committee positions or elected director/officer positions. To enhance this process, the society provides ongoing leadership training seminars geared for the local leaders. The society's annual conference and exposition, which now draws more than 2,400 case management professionals and exhibitors, premiered in 1991 and soon became a valuable marketplace as well as the industry's leading venue for educational programs and networking opportunities.

In nationally recognized innovation, CMSA developed the industry's first *Standards of Practice for Case Management* (recently revised in 2010). Originally released in early 1995, this publication has become a dynamic and timely document which establishes formal written standards of practice from a variety of disciplines. During that same year, the National Board approved a peer-reviewed *Ethics Statement on Case Management Practice*, a base foundation from which to apply ethical principles to the practice of case management.

In June of 2004, CMSA introduced the *Case Management Adherence Guidelines* (CMAG). The guidelines outline and detail the different factors involved in medication adherence and provide a valuable resource for case management professionals to help patients stick to their prescribed medication therapies. CMAG-2 was introduced in 2006 and is an enhancement of the original CMAG training program focusing on "Successful Discharge" for special populations: Hospital, workers' comp, and elderly patients. New material will also assist case managers in explaining the financial and clinical impacts of medication adherence programs.

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## CMSA's 2011 – 2012 Board of Directors

The Case Management Society of America's Board of Directors is chartered with managing all of the association's affairs, including setting policy and the establishment of society bylaws and their corresponding governance. It includes respected national leaders and experts in many areas of health care, acute care and medical management.

### Executive Committee



**Mary Beth Newman,**  
MSN, RN-BC, CMAC, CCP, CCM  
*President*



**Nancy Skinner,**  
RN-BC, CCM  
*President-Elect*



**Betty Overbey,**  
RN-BC, CRRN, CDMS,  
CCM, CRP, MSCC  
*Secretary*



**Jose Alejandro,**  
RN-BC, MSN, MBA, CCM,  
FACHE  
*Treasurer*



**Teri Treiger,**  
RN-BC, MA, CCM, CCP  
*Immediate Past President*



**Laura Bachrach,**  
RN, BSN, MSL, CCM, CLL  
*Member-at-Large*



**Cheri A. Lattimer,**  
RN, BSN  
*Executive Director*

### Directors



**Cathy Campbell,**  
RN-BSN, MBA, CHC, FACHE  
*Chair, Chapter Presidents'  
Council*



**Kathleen Fraser,**  
RN-BC, MHA, CCM, CRRN  
*Director*



**Connie Keene,**  
RN, BSN, CCM, CBIS  
*Director*



**Rebecca Perez,**  
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**Carol Smith,**  
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*Director*



**Cristina Walter,**  
MS, RN-BC, CCM, CCP  
*Director*

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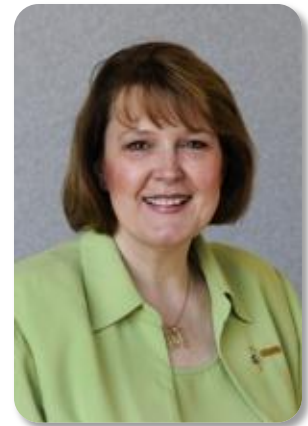
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## About the CMSA Leadership

### 2011-2012 President

**Mary Beth Newman, MSN, RN-BC, CMAC, CCP, CCM**, is a Program Manager for Case Management at WellPoint, Inc. She is responsible for instituting a consistent "best practice" care management program for the Transplant and Bariatric Centers of Medical Excellence Programs at WellPoint; and her experience there includes the development, implementation, and evaluation of targeted, population-based care management programs. Mary Beth's unique skill set includes experience in medical management strategy planning, care management quality improvement processes, medical management system integration and development, development of training and orientation programs, project management, program development, and successful accreditation in the managed care environment.



Mary Beth holds a Master's Degree in Gerontological Nursing from the University of Cincinnati, and is nationally board-certified in nursing case management, advanced continuity of care, case management administration, chronic care, and methods evaluation process. She has over 25 years' professional experience in providing nursing care management, educational services, and consultation in a variety of health care settings. She has presented dozens of presentations at the regional and national levels in the case management industry on a wide range of "current events" topics including outcomes evaluation, health literacy, cultural competency, active listening, and medical tourism.

Mary Beth is the current President of the Case Management Society of America (CMSA) and has served on the National Board of Directors from 2007-2009. She is a founding member of the Southern Ohio Valley Chapter of CMSA, served as its first president, and was the recipient of the chapter's inaugural Excellence in Case Management Leadership Award in 2007.

### Immediate Past President

**Teri Treiger, RN-C, MA, CCM, CCP**, has over 30 years' health care industry experience, 20 of which were in care management. Following many years of bedside nursing practice, Teri began a progression from utilization management to care coordination to case management, working in many settings of practice in order to gain a comprehensive foundation of experience which is essential for today's case management professional. She worked in managed care, acute hospital, and rehabilitation hospital settings before moving to case management program design and implementation.



Teri is a published author. Her writing spans case management topics such as use of technology, patient-centered medical home, and legal nurse consulting business considerations. She is an experienced public speaker and educator on such topics as health care consumer advocacy, multi-state nursing licensure, technology, and current case management challenges.

In addition to her work on behalf of CMSA, Teri is a member of the National Transitions of Care Coalition and the Health Information and Management Systems Society. She is active on a number of national initiatives including URAC's Patient-Centered Primary Care Home Program Advisory Taskforce, the National Perinatal Association's Multi-Disciplinary Guidelines Summit, and the editorial boards of "CMSA Today" and "Professional Case Management."

Teri has devoted many years of service to CMSA, both within her local chapter and at a national level. She was named Case Manager of the Year for the New England CMSA chapter in 2008. After serving as chapter president, Teri progressed to national service as a member of the CMSA Board of Directors. Teri is the current Immediate Past President of the Case Management Society of America.

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## Executive Director

**Cheri A. Lattimer, RN, BSN**, is the CEO and President of CMI, an innovative Consulting and Management company providing outsourcing and advisory services to the care management and health care industries. She serves as the Executive Director for the Case Management Society of America, the Executive Director for the Case Management Foundation, and is the Coalition Director for the National Transitions of Care Coalition. Her leadership in quality improvement, case management, care coordination, and transitions of care is known on the national and international landscape.



In 2009, she was asked to deliver the Anna Reynvaan Lecture at the University of Amsterdam. Ms. Lattimer spoke to over 900 nurses from the Netherlands and Belgium on Integrated Nursing Health Management of the Complex Patient. She has been quoted in several publications including the "Healthcare Executive," Dorland's "Case In Point," and "Professional Case Management Professional and Seniority." She was a contributor and reviewer for the "CMSA Core Curriculum for Case Management" and "The Integrated Case Management Manual Assisting Complex Patients to Regain Physical and Mental Health." She serves on several National Boards and Committees: URAC, Roundtable on Critical Care Policy, CMS Caregiver Workgroup, and participates on several of the Society of Hospital Medicine Advisory Committees: Diabetes, Hospital Collaborative Care, and Better Outcomes for Older Adults through Safe Transitions.

## About CMSA's Professional Services for Members

CMSA offers a wide range of services, events, and publications to assist case management professionals with all aspects of their job, from learning new techniques and acquiring new disciplines to enhancing career opportunities. These include:

### Annual Conference & Expo

CMSA's Annual Conference & Expo offers a high-powered mix of diverse education sessions, leading industry experts and valuable networking opportunities! This annual gathering allows over 2,400 case managers and allied health care professionals to come away empowered with knowledge and information to help them put industry events in perspective. In addition, some of the country's largest and most influential suppliers of health care products and services participate in the Expo making this an unparalleled event.

For more information regarding CMSA's Annual Conference & Expo, please contact:

#### Denise Flake

*Director of Education & Events*

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## Case Management Adherence Guidelines and Training Workshops

The CMAG tool was developed from concepts presented by the World Health Organization (WHO). The foundation: a model for medication adherence that is based on patient information, motivation, and behavior skill needs.

Launched during Case Management Week celebrations in October, 2004, the CMAG workshops have received very positive feedback and ratings. CMAG is now accepted to be the best standard and set of tools ever developed to help Case Managers work successfully with patients in the adherence of taking prescription medicines.

These guidelines are designed to help case managers aid in the assessment, planning, facilitation, and advocacy of patient adherence. They provide an interaction and management algorithm to assess and improve the patient's knowledge and his/her motivation to take medications as they are prescribed. They also provide great flexibility in that a patient's individual needs are taken into account. CMAG Disease-Specific topics include Diabetes, Deep Vein Thrombosis, Depression, Cardiometabolic Risk, and COPD. CMAG offers multi-language manuals available in English, Spanish, French, and Korean. Learn more at <http://www.cmsa.org/CMAG>.

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## Integrated Case Management (ICM) Training

This advanced educational program provides case managers from either medical or mental health backgrounds with the content and skills needed to perform systematic complexity assessments; to develop and carry out comprehensive and coordinated physical and mental health care plans; to apply consistent complexity-based anchor points in specially designed ICM clinical documentation software; and to record ongoing clinical, functional, quality of life, satisfaction, and fiscal outcomes during the management process. This training is presented through a series of webinars, self-study, and then a final face-to-face training. Learn more at <http://www.cmsa.org/ICM>.

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## Educational Resource Library

One of the chief benefits of CMSA membership is its educational programs. CMSA offers courses online and off, all focused on advancing the knowledge, skill levels and career opportunities of case management professionals. CMSA's online Educational Resource Library facilitates "anytime, anywhere" access to educational programs for case managers and allied health professionals serving the care management industry.

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## Career Center

The CMSA Career Center is the premier electronic recruitment resource for the case management industry. Here, employers and recruiters can access the most qualified talent pool with relevant work experience to fulfill staffing needs. Whether you're looking for a new job, ready to take the next step in your career, or seeking to target your recruiting and reach qualified candidates quickly, we'll help you find the opportunity that's right for you.

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## Networking & Social Media Support

CMSA continues to expand its networking and research benefits beyond the Annual Conference and individual chapter events. CMSA offers networking services online through its Online Membership Directory and Communities of Practice (CoP), where members anywhere can share knowledge and ideas and collaborate on the latest issues related to the case management profession. CMSA's online communities support professional networking across geographical boundaries, enabling knowledge development and sharing through online collaboration tools and networks.

To strengthen and extend **the member's** professional network of trusted contacts, CMSA utilizes the technology tools of business-oriented social interaction of Facebook, LinkedIn, and Twitter utilities. Find us at [www.cmsa.org/facebook](http://www.cmsa.org/facebook), [www.cmsa.org/linkedin](http://www.cmsa.org/linkedin), and [@CMSANational](https://twitter.com/CMSANational) on Twitter.

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## CMSA's Care Management Industry Directory

This online tool allows professionals to search for industry-related products and services to find the resources needed for their clients, from behavioral health support to insurance providers, and more. Connect at <http://caremanagementindustrydirectory.com>.

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## Research through CMSA's Resource Toolbox

The CMSA Resource Toolbox features links to a collection of over 100 case management resources, including white papers, journal articles, and websites that care management professionals will find useful in their practice. As a dynamic resource that will constantly be updated on an ongoing basis to stay relevant and current, the Toolbox is designed to help case managers in all areas of expertise and care settings strengthen the development of their individual practice and the profession of case management as a whole.

The online toolbox is a CMSA member-only benefit to help care managers in their day-to-day practice as they advocate for patients' wellbeing and improved health outcomes and help patients understand their current health status, what they can do about it and why those treatments are important.

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## Standards of Practice for Case Management

CMSA's *Standards of Practice for Case Management* was written to provide appropriate, voluntary practice guidelines for the case management profession. The Standards help identify important foundational knowledge and skills of a case manager across a broad spectrum of practice settings and specialties. One free print version is mailed to new members

within 3-4 weeks. Additional print copies can be ordered at a discount price or free copies downloaded at [www.cmsa.org/SOP](http://www.cmsa.org/SOP).

### **CMSA Today™ Magazine**

CMSA Today™ is the Society's new magazine for case managers, with 8 inspiring issues delivered each year. Available in combination of print and digital-only versions, this publication is committed to meeting the information needs of case managers in all sectors of this ever-evolving field.

The magazine is the cornerstone of CMSA's member communications – incorporating print and digital publications, as well as e-newsletters and a complementary news website – all designed to deliver the latest news and information from CMSA and the care management industry.

### **Professional Case Management Peer-Reviewed Journal**

This practical and timely how-to journal is by, and for, case managers in hospitals and other healthcare delivery settings. Professional Case Management features best practices and industry benchmarks for the professional case manager. It is focused on coordination of patient care, efficient use of resources, improving the quality of care, data and outcomes analysis, and patient advocacy. Professional Case Management now includes immediately useful, hands-on information for the day-to-day management of the patient care process.

### **CASE MANAGEMENT CASELOAD CONCEPT PAPER**

CMSA's Case Management Caseload Concept Paper, jointly published with the National Association of Social Workers (NASW), represents the culmination of nearly two years of work by CMSA, NASW, and other members of the Caseload Work Group. This paper includes an updated version of the Caseload Matrix and provides the foundation to develop a calculator to assist in determining appropriate caseload size and case mix for case managers working in health, behavioral health, and workers' compensation settings.

### **Leadership Opportunities**

CMSA encourages active participation in the society by offering leadership positions on national or local chapter levels. The Leadership Ladder encourages chapter leaders to progress to national positions through leadership training provided by local chapters.

### **Public Policy & Legislative Advocacy**

CMSA promotes the benefits of case management and advocates the goals of the profession through active programs to educate the media, government officials and the general public. This is done through national coordination at the board level as well as on a grassroots, chapter level.

Through its Public Policy Committee – which advocates for legislative and regulatory issues that may impact CMSA, its members, or the practice of case management – CMSA continually seeks to focus the important issues facing our health care system and encourage the adoption of the latest standards

In August of 2009, CMSA launched the *Case Management Model Act* setting forth important standards for case management services with key provisions covering Staff Qualifications, Case Management Functions, Authorized Scope of Services, Payment of Services, Training Requirements, Quality Management Programs, and Antifraud & Consumer Protections. Provisions of the Model Act are encouraged to be adopted either at the federal or state levels through either legislative or regulatory bodies.

### **Public Policy Summit**

Each year, fellow case management professionals from across the country visit Washington, DC to educate Congress on the importance of case management to the effective delivery of health care. This annual Summit teaches case managers how to use their local grassroots networks for legislative success and network with CMSA's Public Policy leaders.

The event is open to all CMSA members, staff, volunteers, and case management professionals who are passionate about association issues and want to make a difference by meeting and networking with fellow advocates from across the country. For additional questions about this event, contact CMSA's Government Relations Department at [policy@cmsa.org](mailto:policy@cmsa.org).

## Case Management Model Act

CMSA's Case Management Model Act is an outgrowth of health care reform and other federal activities in which case management and care coordination are addressed. As the largest and oldest professional association representing the practice of case management, CMSA and industry leaders want to make sure case management is properly defined to ensure the best quality of care for patients. CMSA worked collaboratively with industry partners to develop the CM Model Act to define case management at the federal level. Increasingly, CMSA leaders are being sought by regulators to assist in defining the role of case management in health care delivery. Currently the CM Model Act is being presented to members of Congress with the ultimate goal of sponsorship into law. Find it at [www.cmsa.org/modelact](http://www.cmsa.org/modelact). To learn more about how you can get involved with public policy advocacy on National and Local levels, visit [www.cmsa.org/publicpolicy](http://www.cmsa.org/publicpolicy).

## Multistate Nursing Licensure

The Issue: Nurse Licensure rules and regulations were formed when nursing was practiced primarily within the boundaries of one or two states. With the development of managed care, tele-health and mobile populations, nurses are frequently required to work with patients who travel or reside across multiple state lines. Unlike driver's licenses, many state nursing licenses are not recognized by other states.

The Impact: Nurses and their employers are vulnerable to:

- Excessive costs for additional licensure
- Administrative oversight of additional fees
- Vulnerability to lack of malpractice coverage

Most managed care employers do not cover these expenses leaving both the employer and nurses personally vulnerable. The Solution: Nurse Compact Licensure. 20 state boards of nursing have joined together to form a Nurse Compact in which participating states mutually recognize nurse licenses from other Compact states.

The Goal: The goal of the CMSA position statement is not to create an administrative nightmare or to create additional costs to organizations or to the US healthcare system. The purpose of the CMSA position statement is to alert and to encourage individuals and organizations to aggressively encourage the non-Compact State Boards of Nursing to join the Compact or to encourage federal legislation mandating recognition of nurse licensure across state lines.

## National Case Management Week

Plans for National Case Management Week began in 1998 as an effort to help move the Case Management Society of America (CMSA) forward. It was the first major initiative of the association since its merger with ICMA in 1995. The CMSA Board of Directors agreed to a Case Management Week celebration, which began with a single press release announcing the details during the week of October 10, 1999, the first anniversary of the newly established CMSA.

Later, it was decided to mark the second full week in October each year as National Case Management Week, and the idea quickly spread as other organizations also began to establish their own CM Week celebrations. In an effort to strengthen the movement, collaborate with other organizations, and avoid confusion about the celebration, CMSA approached those organizations about unifying the annual event and marking it during the same week.

Initially, CM Week was promoted only to CMSA chapters, but as interest in the event grew, CM Week promotions extended to employers, as well as the full membership. Almost 12 years later, CMSA promotes the National Case Management Week celebration extensively with an annual CM Week theme and logo design, as well as through member promotions, national press releases, online tools and resources, and sales of promotional products. CM Week items include lapel pins, t-shirts, totes, mugs, cups, luggage tags, and more. In honor of the week, CMSA members are encouraged to wear their pins and t-shirts, plan celebratory events for their colleagues, and have CM Week prize giveaways. CMSA also encourages members to share their CM Week celebration stories each year.

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## Contact CMSA

For additional information, please contact:

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