INTEGRATED CASE MANAGEMENT’S CONTRIBUTIONS TO WHOLE-PERSON CARE

BY REBECCA PEREZ, MSN, RN, CCM

The most expensive and challenging populations found in the current healthcare system will remain underserved until there is a unified effort rather than small incremental steps to improve care for the nation’s high needs patients.”
—National Academy of Medicine

Care provided to individuals with complex health needs is often the most expensive, inefficient, and poorly coordinated across medical, behavioral, and social providers (Humowiecki, 2018). To promote health and wellness, a comprehensive approach to prevention is required. The Whole Person Care model is one such approach. Whole Person Care (WPC) goes beyond biopsychosocial care to focus more on the relationship between patient and provider, not on the illness, condition, or disease (Thomas, 2018). WPC improves prevention efforts by addressing the factors that adversely affect an individual’s ability to be healthy. This translates to focusing on “health” and not “sickness.” WPC is the next generation of population health management but will require additional efforts (Swift, 2020). Strong
organizational leadership and local stakeholder partnerships are needed to locate and provide services as are necessary for the most at risk and vulnerable (Swift, 2020). Mental health, social services, and wellness activities need to be aligned with medical care. To create a whole person framework, the characteristics of the targeted population need to be determined: what social determinants are present, income status, social supports, who utilizes and who does not utilize health services. All require analysis to determine what care management efforts and interventions will be of benefit.

Individuals with multimorbid conditions pose a challenge in the coordination of care. Care from multiple providers is standard, and coordination of this care from various sites often falls to the primary care provider (PCP). With shrinking numbers of PCPs and the growing number of individuals with multimorbid conditions, PCPs struggle to manage (Humowiecki, 2018). More practices are incorporating case management to assist with care coordination. Still, for those practices too small to hire case management staff, payer case managers can help with these activities. Multidisciplinary primary care practices contribute more to care coordination than solo practices (Kaufman, 2017).

WPC does not exclude any disease, condition, or circumstance. When executing a WPC model, one primary care provider addresses all needs that challenge an individual. The integration of medical and behavioral health is of itself a significant barrier. Healthcare professionals must be open to managing all the needs of a patient. Patients prefer the ability to receive most care and services in one location by trusted professionals. That doesn’t mean specialists are no longer needed or accessed; instead, these are ancillary services coordinated by the PCP. At present, healthcare professionals remain challenged by a lack of complete integration of data, agendas, and health goals (Stumm, 2019). Most organizations agree that the problems facing individuals with complexity are that care is not sufficiently person-centered. Social determinants of health are not adequately addressed, data is scattered over multiple systems, and the current payment systems still reward volume over outcomes (Kaufman, 2017).

The many challenges of complexity have been outlined here, and while there is no one solution, case managers or integrated case managers are part of the solution. Case managers trained in an integrated approach are experienced but have participated in additional training to gain skills that improve care coordination for the most complex and vulnerable population. Long before whole-person care was identified as a preferred model, CMSA provided education and training to adopt an integrated approach. CMSA’s Integrated Case Management program supports the WPC model and has been available since 2006. Case managers learn to engage and sustain trusted patient relationships as the primary contact managing all of their conditions, improve communication, advance assessment skills by learning to have a conversation instead of an interrogation. They understand the importance of removing bias and judgment, and accepting who the patient is: a unique individual with a unique story. Every individual with diabetes cannot be treated identically. Evidence-based and best practices for diabetes management do not mean every patient will respond favorably or as expected to the same treatment plan. When complexity is present, the causes can be much more than disease burden or symptomatology. Social determinants, under-treated, or untreated behavioral conditions are the most common contributors to poor health. Case managers trained in an integrated approach learn to longitudinally assess risk in the four domains of health: biological, psychological, social, and health system. Examining risk in each part, individually assess risk in the four domains of health and social needs. Retrieved from https://bmcfampract.biomedcentral.com/articles/10.1186/s12875-019-1048-y


Rebecca Perez, MSN, RN, CCM, is an experienced RN with a master’s degree in nursing, is a Certified Case Manager, and a member of the Gamma Omega Chapter of Sigma Theta Tau International Nursing Honor Society. She is the author of numerous professional articles, a co-author of CMSA’s Integrated Case Management: A manual for case managers by case managers, developer of the Integrated Case Management Training Program, and Master Trainer. She recently joined Parthenon Management Group as the Senior Manager of Education and Strategic Partnerships.