

# Case Management Pilot

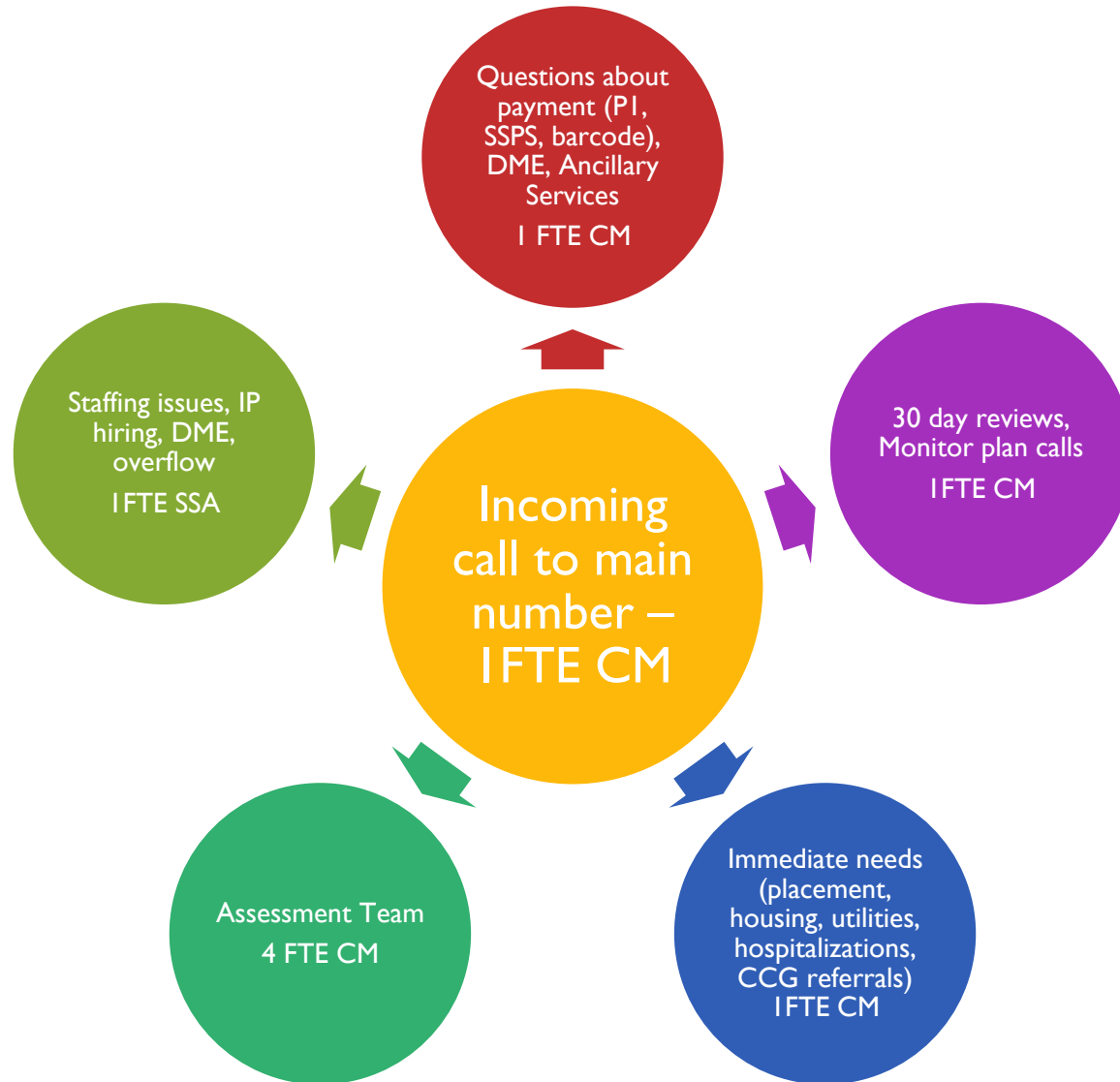
A Team Approach



# Pilot launch details

- Began April 1<sup>st</sup> 2015
- 9 FT Title XIX caseloads
- 8 FT Case managers
  - 4 assessors
  - 4 in-office CM's
- 1 Social Service Aide
- 1 Supervisor
- Assignments rotate every 3 months
- Team meeting for weekly staffing and process adjustments

# Team Roles



# Objectives

- Improve client customer service
- Increase case manager job satisfaction
- Increased efficiencies & cost savings



# Goals

- Meet assessment deadlines
- Meet 30-day and other direct client contact deadlines
- Decrease call back time by having someone staff the phones during business hours
- Promptly address client needs with DME or ancillary services
- Cost less through use of fewer staff or less costly classifications

# Challenges



# Individual challenges

- Personal connection with clients is changed
- Loss of case management roles as previously known.
- Getting through backlog of previous work
- Sense of control and planning of schedule seems decreased

# Team Challenges

- Adjustment period of new body of work
- Team members perceive they are working harder to meet the standards of entire team
- Need to rely more on team members and meetings to meet client needs.
- Balancing work load between the new roles



# Measurement Tools

- Systems reports
- Team records
- Case management staff reports
- Client reports
- Observations of manager and supervisors



# Preliminary Outcomes



# Improve Client Customer Service Objective Measures

- Timeliness of assessments and 30 day visits
- Numbers of referrals for DME and other ancillary services
- Increased RN and CT referrals
- Increased contact with outside professionals, such as CCG and hospital staff
- Increase coordination between care team members
- Clients remain financial eligible

# Improved Client Customer Service Subjective Measures

- Anecdotal reports from clients
- Decreased complaints to supervisor
- Faster response times for returning calls and completing significant change assessments



# Improved Client Customer Service Anticipated Improvements

- Reduced acute mental health crises
- Increase positive health outcomes
- Increase successful placements
- Decrease evictions, utility shut-offs

# Increased Case Manager Job Satisfaction

- Increased morale in working as a team
- Increased expertise in areas
- The team has been able to absorb extra work
- CM's focus on working with clients rather than paper – a return to client centered care
- Increased training when onboarding new CMs
- Creating a career path from Social Service Aide up to Supervisor

# Efficiencies and Cost Savings - Program

- Assessors averaging 18-20 assessments per month
- Meeting 30 day deadlines
- Absorb additional work when CM is out, on leave or vacated the position
- Decreased staffing costs
- Increased efficiency resulting from less multi-tasking and increased specialization of tasks

# Efficiencies and Cost Savings – Community Partners

- Increased CT and RN referrals, decreasing unnecessary hospitalizations & placements
- Increased responsiveness regarding financial eligibility issues
- Barcodes, ProviderOne and SSPS ticklers up to date
- Decreased delinquency on payment authorizations to vendors





# Ideas For The Future

- Decrease number of case managers while increasing lower classifications such as assistant counselors and SSAs.
  - Allow clinical staff to focus on direct service
  - Shift lower skilled tasks to appropriate classifications
  - Potentially expand to include a Sr. Counselor as a career development step

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