



*The Commonwealth of Massachusetts*  
*Executive Office of Elder Affairs*  
*One Ashburton Place, Boston, MA 02108*

ARGEO PAUL CELLUCCI  
GOVERNOR

FRANKLIN P. OLLIVIERRE  
SECRETARY

Phone (617) 727-7750  
Fax (617) 727-9368

PROGRAM INSTRUCTION

EOEA-PI-97-46

TO: Home Care Corporations  
Area Agencies on Aging

FROM: Franklin P. Ollivierre *Regina Glulian for*

DATE: December 2, 1997

RE: INTERDISCIPLINARY CASE MANAGEMENT STANDARDS

The Executive Office of Elder Affairs has recently developed Interdisciplinary Case Management Standards for Aging Services Access Points (ASAPs). The purpose of these standards is to ensure consistency and to enhance the quality of interdisciplinary case management services provided by ASAPs to elders throughout Massachusetts.

The standards are based on the current operations of Home Care Corporations (HCCs) in administering the Home Care and Coordination of Care Programs. They were developed in cooperation and consultation with representatives from the HCC network.

The standards state that case managers will be required to have a Bachelor's degree in social work, human services, nursing or a related field. Significant, relevant work experience may be substituted for a portion of the degree. All Registered Nurses will be required to possess a Bachelor's degree in Nursing or Human Services, a Massachusetts license to practice as a registered nurse and a minimum of three years clinical experience, one of which must have been in community nursing. At the discretion of the ASAP, nurses who do not possess Bachelor's degrees, but have an additional two years of community based nursing experience or long term care direct service may be hired.



While the interdisciplinary case management standards may be new, many HCCs have already begun to meet the requirements. The following information was obtained from the ASAP RFR responses which presented information on 704 staff members from the HCCs:

1. 87% of the staff possess bachelor's degrees, and 4% possess Associate's degrees.
2. 30% of all case managers and protective service workers possess a social work license.
3. 29% of those with college degrees possess a license.
4. Of the 9% who do not possess a degree 33% hold a social work license.

The standards are effective January 1, 1998. The ASAP may waive the education and work experience requirements for case managers and nurses hired before January 1, 1998.

Please contact Ellen Birchander at (617)222-7479 if you have any questions regarding these standards.

## INTERDISCIPLINARY CASE MANAGEMENT STANDARDS

**Interdisciplinary Case Management:** The provision of a client centered approach to assessment, service acquisition, reassessment, and monitoring of services provided, to assist elders to live independently in the community. It includes working cooperatively, coordinating service plans and maintaining ongoing communication with the elder, family members, informal supports and formal supports as necessary.

Interdisciplinary case management is provided by registered nurses and case managers employed by ASAPs working in consultation with physicians, nurses and therapists from home health agencies, hospice providers, nutritionists, housing managers, mental health professionals, and other home and health care professionals.

### **I. Duties and responsibilities include:**

1. Completing client oriented needs assessments which identify issues or problems which inhibit secure independent living at home;
2. Assessing an elder's functional, health and income status to determine eligibility and appropriateness for community long term care services or programs;
3. Working with the elder, formal supports and other informal caregivers to develop a service plan which addresses the elder's needs;
4. Initiating, authorizing, and monitoring service plans to effectively assist elders to maintain independent living;
5. Coordinating and communicating service plans and changes to appropriate community agencies;
6. Ensuring that clients have access to public benefits and other community services; and
7. Conducting periodic reassessments to determine appropriateness of the service plan.

## **II. Educational Requirements and Work Experience.**

1. **Case Managers** have a Bachelors degree in social work, human services, nursing, or a related field. Experience working with older people and/or experience working in a community service setting is preferred.
2. **Registered Nurses** have a Bachelor's degree in Nursing or Human Services, a Massachusetts license to practice as a registered nurse, and a minimum of three years clinical experience, one of which must have been in community nursing. At the discretion of the ASAP, nurses who do not possess Bachelor's degrees, but have an additional two years of community based nursing experience or long term care direct service experience may be hired.

## **III. Initial Orientation and Training**

1. Initial Orientation/Training. An ASAP shall provide orientation and training regarding ASAP responsibilities and tasks to all nurses and case managers providing interdisciplinary case management.

At a minimum, the orientation and initial training will include:

- An overview of social, financial and health issues related to aging.
- The philosophy of interdisciplinary case management.
- Interviewing and assessment training.
- Working with and engaging informal caregivers and informal supports.
- Training on identifying elders in need of mental health, substance abuse treatment or Protective Services.
- Information about the Mass Health Senior Care Plan.
- Information about long term care programs and services for elders living in the community. This includes but is not limited to the following: Council on Aging services, Home Care Program, Home Health Services, Hospice Services, Group Adult Foster Care and Adult Foster Care, Personal Care Attendant Programs, and PACE.
- HOMIS and Documentation Standards.
- An overview of ASAP contract, applicable EOEA Regulations, Program Instructions, and Informational Memos.
- Principles of and approaches for quality improvement.

## 2. Ongoing Training.

Case managers and nurses shall receive a minimum of quarterly training/seminars related to skill development, aging topics/issues, or long term care services.

Continuing Education Units (CEUs) to provide ongoing education to enhance quality of service must be maintained in accordance with the licensure requirements where appropriate.

Case managers and nurses with specialized functions such as housing, Alzheimer's, Respite, ECOP, bilingual and cultural functions carrying out these responsibilities will have access to additional training specific to the function to develop, enhance and maintain skills.

## IV. **ASAP requirements.**

### 1. Job descriptions.

ASAPs shall have written job descriptions which include a core of specific duties and responsibilities as well as agency specific qualifications.

### 2. Supervision.

An ASAP shall have a standard guideline including scope and duration of interdisciplinary case management supervision to enhance an ASAPs ability to provide and monitor the quality of services.

Interdisciplinary case management supervision shall be provided at least weekly through individual or group meetings. These meetings will provide opportunities for case discussion, case review, monitoring and problem solving as well as support and debriefing for the staff. New staff members will receive additional supervision for the first six months.

### 3. Evaluation.

Case managers and nurses shall be evaluated within the first six months after hire and annually thereafter on the anniversary of hire.