

CASE MANAGEMENT LEVEL I

Definition: At Level I, case management services provide support in negotiating the sub-contracted site's internal processes including eligibility determination, preliminary assessment, routine tracking and recall.

Objectives: At his level, case management services within the site will ensure that clients have received area specific information about public assistance programs for health and social services to which they may be entitled, have received an assessment related to their health problem and a plan of care that has been developed which provides for health and social problem follow-up as indicated.

STRUCTURAL INDICATORS

- A case manager has been identified to deliver Level I case management services.
- The assessment identifies the ability of the client to participate in the plan of care and indicates environmental and client-related obstacles to implementation.

PROCESS INDICATOR

- The assessment elicits information about the client's sources of food, shelter, income, health care and transportation.
- The plan is clearly related to the assessment.

OUTCOME INDICATORS

- A plan for client contact is in place.

CASE MANAGEMENT LEVEL II

Definition: Case management at Level II consists of the services offered at Level I plus routine referral for other services, including making the appointment and providing or arranging for transportation to the secondary site,

Objectives: At this level, case management services will ensure that necessary client services which are not available at the site where services are originally offered are provided at an outside referral site. Arranging for appointments and transportation to the outside referral site are responsibilities included in Level II case management. This level of case management includes the verification that the secondary site is available and appropriate for referral.

STRUCTURAL INDICATORS

- A Level II case manager has been identified
- Communication and transportation mechanisms between primary and outside referral sites exist

PROCESS INDICATORS

- The problem requiring case management has been clearly identified.
- The ability and willingness of the client to participate in the plan of care has been assessed.
- The plan clearly identifies the referral site and transportation plan.

OUTCOME INDICATORS

- A mechanism for the evaluation of the adequacy of the referral, appropriateness of the service to the client is in place.

CASE MANAGEMENT LEVEL III

Definition: Level III case management includes all the services of Level I and Level II plus assisting the client to complete forms, accompanying the client to the referral site to provide introductions and support as well as contacting the client to make additional appointments. Visits to the client's "hangout", "turf", "squat" or residence are included in Level III case management.

Objectives: This level of case management services ensures that the client successfully negotiates the transition from the initial contact site to another service system. Total case management may be reserved for certain high risk clients who require special assistance to negotiate complex or highly structured health or social systems.

STRUCTURAL INDICATORS

- A case manager to deliver Level III services for this client has been identified.
- The target group of clients to receive Level III case management services has been identified.

PROCESS INDICATORS

- Criteria exist to identify clients who lack the resources to independently negotiate the referral system.
- The client participates in and approves of the plan.
- The case manager advocates on behalf of the client within the outside referral system.
- A plan for follow-up, continuing contact, and re-evaluation exists.

OUTCOME INDICATORS

- The client accomplishes the activities for which the referral was made.

This form was developed by Eleanor M. Gray, R.N. while working at the Northeast Valley Health Corporation Health Care for the Homeless Program in San Fernando, CA.