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Dedicated to the Support and Development of Case Management Professionals



## PRESS RELEASE

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FOR IMMEDIATE RELEASE

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## CMSA & NASW Seek Comments on Factors Impacting Case Load

*Work Group Developing Matrix to Determine Appropriate Case Loads for Case Managers*

WASHINGTON, DC, & LITTLE ROCK, ARK. — The Case Management Society of America ([CMSA](#)) and the National Association of Social Workers ([NASW](#)) are [soliciting feedback](#) from social workers, nurses, other health care professionals, and consumer advocates on factors affecting case load. Identification of such factors is the first step in developing a matrix to determine appropriate case loads for case managers of all disciplines in a variety of settings.

Recognizing the crucial role nurses and social workers provide in case management — and the need for a more consistent approach to determining case loads — CMSA and NASW are developing the case load matrix in conjunction with the Case Load Work Group. The Work Group, chaired by CMSA and Schooner Healthcare Services, also plans to release a white paper on the topic in late 2007.

"Several recent studies have demonstrated that there is an inconsistent approach to establishing case loads. This inconsistency can compromise patient care and create unnecessary administrative problems," notes Cheri Lattimer, RN, BS, Executive Director of CMSA. "The Case Load Work Group was formed earlier this year to create a framework — based upon clinical, psychosocial, business, legal, regulatory and other factors — to help nurses, social workers, and other health care professionals determine what their respective case loads should be."

"The challenge of tracking and optimizing case load levels covers a wide array of practice settings — including health care, behavioral health care, aging, and long-term care," says Elizabeth Clark, PhD, ACSW, MPH, NASW Executive Director. "In this phase of the case load matrix development, we considered the multiple factors that influence a case manager's case load. Our goal is to create a

tool that will be useful to all case managers."

The Case Load Work Group, chaired by Lattimer and Garry Carneal, JD, MA, President & CEO of Schooner Healthcare Services, has identified a number of challenges to a consistent approach to establishing case loads:

- Rapid changes in the medical management field such as the integration of utilization management (UM), case management (CM) and disease management (DM) platforms have made it more difficult to rely on old benchmarks
- Research has shown a wide array of case load methodologies yielding various case load requirements
- Nurses, social workers, and other case managers have complained of inconsistent and inappropriate case loads for years
- The peer-reviewed literature on this subject to date has not provided a clear-cut solution
- As initial output from the Case Load Work Group demonstrates, dozens of independent variables can influence case load
- Information technology platforms now offer an opportunity to standardize and automate the process — which should yield superior case load methodologies in the future
- Several case load calculators are now being used mostly through in-house applications. CMSA and NASW hope to stimulate the identification and sharing of best practices through these emerging applications

The Case Load Work Group welcomes comments on the draft chart of elements impacting case load through **September 17, 2007**. Please visit <http://www.cmsa.org/CaseLoadCalculator> to review and comment on the draft.

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[About the National Association of Social Workers](#)

The National Association of Social Workers (NASW), in Washington, D.C., is the largest membership organization of professional social workers with 150,000 members. It promotes, develops, and protects the practice of social work and social workers. NASW also seeks to enhance the well-being of individuals, families, and communities through its advocacy. For more information, please visit [www.socialworkers.org](http://www.socialworkers.org)

[About CMSA](#)

Established in 1990, the Case Management Society of America is an international non-profit 501(c)(6) multi-disciplinary professional association dedicated to the support and advancement of the case management profession through educational forums, networking opportunities, legislative advocacy, and establishing standards to advance the profession. According to the *Standards of Practice for Case Management — Revised 2002*©, the term "case management" is defined as: "... A collaborative process of assessment, planning, facilitation, and advocacy for options and services to meet an individual's health needs through communication and available resources to promote quality cost-effective outcomes." CMSA is based in Little Rock, Ark, and serves more than 20,000 members/subscribers and 70 affiliate and pending chapters. Since its inception, CMSA has been at the forefront of setting professional standards for the industry, which allows for the highest level of efficiency and integrity, as well as developing national and local leaders who are recognized for their practice and professional excellence. For more information on CMSA or [ORLANDO 2008](#) — CMSA's 18th Annual Conference & Expo at Rosen Shingle Creek Hotel & Golf Club, visit [www.cmsa.org](http://www.cmsa.org) or call CMSA at (501) 225-2229.

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