

Case Study: Case Management

Project Overview:

Soyring provided case management leadership and consulting services to a hospital system in the Northeast. The system was anchored at one campus by a 450+ bed hospital and at a second campus by another 250+ bed hospital. Case management services included approximately 40 FTEs providing services within the system. Soyring assisted in the redesign of the case management system across a 7-month period.

Project Objective and Approach:

The main objectives for the engagement included the following:

- ✦ Provide leadership for case management at both campuses
- ✦ Establish effective working relationships with medical staff to meet corporate goals of decreasing LOS and resource consumption
- ✦ Improve intradepartmental staff relationships between Case Managers and Social Workers
- ✦ Assist in recruitment of and leadership transition to new corporate Case Management Director
- ✦ Evaluate department staffing, scheduling, roles and responsibilities and staff development needs
- ✦ Assist in implementation of new case management and utilization review software system

An assessment was conducted to identify operational and leadership initiatives for Case Management. The results of this assessment were presented to corporate leadership, as well as key stakeholders at each campus. Initiatives were identified and prioritized to be worked on with goals and timelines aligned with the onboarding of the new Case Management Director.

Project Results:

- ✦ Operational assessment conducted to identify areas of greatest opportunity
- ✦ Day-to-day leadership of case management services
- ✦ Specific activities included the following:
 - Observations were made regarding department staff roles for the determination of responsibilities and recommended staffing levels
 - Improved collaborative work structure with Physician Advisor and Vice President of Medical Administration
 - Integration of the Case Management and Social Services staff
 - Acquisition of new office space to integrate staff
 - Established length-of-stay (LOS) walking rounds for high resource consumption patients either in cost and/or duration of stay with Physician Advisor.
 - Instituted a process for daily reconciliation of accounts being held in the billing office as unable to bill due to lack of clinical information by the case management departments at both sites.
 - Succession Planning instituted for those key individuals who had no successor for emergencies
 - Significant improvement in employee satisfaction demonstrated in employee satisfaction survey
 - Process streamlining for Medicare Utilization Review (Medicare Less than Two Day Stays) with integration into Case Management Software System initiated
 - Development of HIPAA compliant process to provide daily case lists to Managed Care and Home Care Liaisons
 - Participation in the selection of and orientation to the position of the new Corporate Director of Case Management

