

Clinical Case Management Core Competency Individual Assessment

Name: _____

Orientation Start Date: _____

Completion Date: _____

Instructions: Pre-Assessment-the case manager will rate each knowledge, skill, or ability (KSA) from 1 (novice) to 5 (expert) in each box. Following orientation or training, the case manager and preceptor will collaboratively provide a post-assessment. **Bold/asterisked (*) KSAs must be rated "competent" for independent practice.**

Competency (Knowledge, Skills, Abilities)	Assessment		Method	Comments	Ref: Mosby's Skill Title
	Pre-	Post-			
MANAGEMENT SKILLS					
*Resource Identification: Identifies and understands what resources are available, and builds and maintains effective working relationships with interdisciplinary care team members within internal and external healthcare systems.					Collaboration
Appreciation of Difference: Understands and appreciates the different views, expertise and experience of others; understands the perspectives and limitations of other individuals and systems.					
Creative Advocacy: Finds creative and effective ways to advocate for clients.					
*Works Across Systems and Programs: Participates constructively on inter- and intra- agency work groups and activities to clarify and improve systems and program functioning and service delivery.					
Colleague Support: Offers support to colleagues.					
Administration Relations: Relates effectively with all levels of administration inside and outside the organization.					
*Work Management: Shows ability to plan, schedule, and coordinate the work of self and others.					Organizational Ability
Work Assignments: Balances task requirements and individual abilities (matching people and assignments).					

Assessment

- 1 = Novice (no experience)
- 2 = Advanced Beginner (marginally acceptable performance)
- 3 = Competent
- 4 = Proficient
- 5 = Expert (precepts, teaches)

Evaluation method _____

- D = Demonstration/Observation
- I = Interactive Class
- T = Test
- V = Verbal

Pre-Assessment Page Total: _____

Post-Assessment Page Total: _____

Note: Pre-Assessment is the case manager's self-assessment in the knowledge, skill, or attitude; post-assessment is a collaborative result of the case manager's status post orientation/assessment.

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Competency (Knowledge, Skills, Abilities)	Assessment		Method	Comments	Ref: Mosby's Skill Title
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Work Organization: Organizes materials, services and activities to accomplish case goals efficiently and effectively.					
Goal Setting: Sets challenging yet achievable goals for self and others.					
Vision: Shows ability to communicate a clear vision in a way that inspires genuine motivation and commitment to the safety and well-being of children and families.					
Leadership Style: Shows awareness of how team leadership style impacts on interdisciplinary team's productivity and functioning.					
Situational Leadership: Shows ability to modify leadership style to meet situational requirements					
Focus: Shows ability to manage within a context of multiple or ambiguous directives while staying focused on major goals.					
*Critical Thinking: Uses knowledge of the system to identify opportunities and problems; demonstrates the ability to think critically and strategically.					
*Information Sharing: Keeps people informed and up-to-date about activities, sharing all relevant or useful information that affects the group.					

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LEADERSHIP KNOWLEDGE AND SKILLS					
*Consensus Building: Shows the group process skills needed to get interdisciplinary groups of people to work together effectively to build consensus and compromise to achieve a common goal.					Team Management Skills
Seeking Input: Solicits data, ideas and opinions for specific decisions and plans.					
Group Problem Solving: Engages with other interdisciplinary team members in group process to identify and solve problems.					
*Conflict Resolution: Works with others to find a win/win resolution of differences; prevents/defuses unnecessary conflict; recognizes the complexities inherent in conflict; proactively engages others in conflict resolution.					
*Group Dynamics: Understands concepts of team development, coaching, mentoring, facilitation of effective meetings, and conflict management.					
Reflective Practice: Effectively utilizes reflective practice techniques to review situations and learn from experience.					
Understanding Others: Perceives strengths, needs, challenges, and feelings of others.					Interpersonal Understanding
*Diversity: Understands and values diversity and different styles of perceiving, learning, communicating, and operating.					
Responding to Others: Uses understanding based on listening and observation to anticipate and prepare for others' reactions.					

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Emotional Sensitivity: Recognizes emotion- laden issues or situations and handles them with sensitivity.					Communication
Open Communication: Creates opportunities for open communication and sharing of information, adapting approaches to audience.					
Attentive and Responsive: Gives verbal and nonverbal evidence of attentive listening to gather facts, provide a sounding board, make people feel heard, etc.					
Questioning Techniques: Uses a variety of questioning techniques to elicit information needed to form conclusions and/or make decisions.					
*Ensures Information is Comprehensive and Clear: Makes sure clients/families have all the available information needed to manage situations and make sound decisions; explains complexities in an easy-to-understand manner.					
*Respects Confidentiality: Respects requirements for confidentiality and exercises discretion when sharing information.					Interpersonal Understanding
Written Communication: Prepares clear, accurate and appropriate written communication and/or documents.					
Dialogue vs. Discussion: Recognizes the difference between dialogue and discussion and uses each appropriately.					
CRITICAL THINKING AND KNOWLEDGE/SKILLS					

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*Identifying Elements of Problems: Seeks out relevant data and analyzes complex information to determine the important elements of a problem situation.					Problem Analysis
Developing Alternative Approaches: Uses critical thinking to assess alternative approaches to problems and/or decisions.					
Analysis of Underlying Issues: Identifies underlying issues or causes and gaps between theory and practice.					
Using Information: Reaches reasonable conclusions and makes sound decisions based on available information.					
Balance: Balances short and long term considerations.					
*Priorities: Sets priorities for tasks in order of importance.					
Objectivity: Maintains objectivity in handling difficult issues, events, or decisions.					Interpersonal Understanding
Using Frameworks and Experience: Uses theoretical frameworks as well as learning from past experience to guide analysis or actions.					
Past Experience: Applies past experience to interpret events, seeing crucial similarities and differences in present and past situations.					
Reframing: Shows ability to reframe situations in order to solve problems or create alternative solutions.					
SELF MANGEMENT SKILLS					
Positive Attitude: Is enthusiastic and energetic; likes the job.					

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Values Safe and Healthy Families (Family members and/or those individuals designated by the client as the client's support system): Has firm values and beliefs about advocating for children and preserving families.					
Responsibility for Completion: Takes ownership; assumes responsibility as a driving force in getting things done or in making changes with clients, agencies and the community					
Perseverance: Perseveres in the face of disappointment, hostility or adverse conditions; resists dwelling on disappointments; motivates self to make the best of things.					
Problem Solving: Takes responsibility for addressing problems and seeing solutions through to completion.					
CRITICAL THINKING AND KNOWLEDGE/SKILLS					
Strengths and Limitations: Understands and reflects upon own strengths and limitations and the implications for professional role as team leader.					Self - Awareness
Intuition and Instinct: Is in touch with own intuition and instincts.					
Values and Culture: Understands and reflects upon own values, cultural/personal style, familial background and how each may impact others.					
Sensitive and Adaptable: Understands how he/she is perceived by others and modifies style appropriately to situation.					

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Integrates Change: Understands that people change over time, recognizes changes in self and others, and integrates this into his/her practice.					Self-Control
Limit Setting: Acknowledges importance of prudently "taking care of oneself" to maintain mental health and conserve energy and enthusiasm.					
Truth Seeking: Resists jumping to conclusions; checks out hearsay and others' opinions in order to form opinions and conclusions based upon first-hand interaction and assessment.					
Maintains Composure: Maintains composure in stressful situations; persists despite turmoil or conflict.					
Stress Management: Copes with stresses and emotions.					
Sense of Humor: Exhibits a sense of humor or perspective.					
Patience: Demonstrates patience and acceptance; gives people reasonable time to understand or to change.					Self Confidence
Optimism and Trust in Self: Believes in own decisions; and is optimistic about own ability to get the job done.					
Decisive Action: Is able to think on one's feet and to be decisive in ambiguous or chaotic situations.					
Assertiveness: Knows when to be assertive, when to take a strong stand on issues, when to confront others.					

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	Pre-	Post-			
Fairness: Recognizes the pros and cons of alternative views.					Self-Control
Adaptability: Adapts personal and professional styles to meet the needs of specific situations or clients and families.					
Open to Change: Is open to new information and changing own opinion.					
Re-directive: Is able to shift gears and redirect activities.					
Acknowledges Case Outcomes: Acknowledges and copes with both positive and negative outcomes of cases; recognizes and deals with issues of grief and loss, including lost opportunities and perceived error.					
TECHNICAL KNOWLEDGE AND SKILLS					
Statutory and Regulatory base: Understands the basis in federal and state law, regulations and rules for the operation of social service programs					Statutory and Regulatory Bases
Knowledge of Relevant Statutes: Knows the specific statutes related to the disciplines involved in the case, and their interrelationship with other related laws.					
Terminology, Definitions and Concepts: understands the legal terminology, definitions and concepts of the disciplines involved in the case.					
Legal System: Understands jurisdictions of various courts that deal with children and families.					
*Policy Base: Understands the basis in policy for the operation of social service programs.					Policy and Procedures

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*Policy and Procedures: Knows the specific policies and procedures related to the social service programs and their interrelationship with each other.					Policy and Procedures
*Terminology, Definitions and Concepts: Understands policy terminology, definitions and concepts and is able to apply them appropriately to case management.					
*Ethical Issues: Understands the policy requirements of ethical practice and the ramifications to staff and clients when this does not occur.					
*Documentation: Knows information to be accumulated, analyzed and recorded; appropriate forms; relationship between documentation and accountability.					Patient, Family and Support System Centered Practice
*Non-judgmental: Utilizes a non-judgmental patient, family & support system centered approach to case management.					
*Involves Key Players: Identifies key players in a patient, family & support system's life and configures the interdisciplinary and community team.					
*Individualized: Assesses patient, family & support system to identify needs that are unique to each individual and develops plans that are as "normal" as possible, culturally sensitive and specific to each case.					
Strengths-based: Assures that patient/ family/support system member strengths are identified and ties strengths to actions when developing a case plan.					

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*Life Domains: Considers life domain areas (e.g. residence, patient/ family/support system, social, emotional/psychological, educational/vocational, safety, legal, medical, crisis intervention, spiritual, cultural and financial) when developing case plans.					Case Management
*Case Management Principles: Understands and is able to identify standards for Integrated Case Management.					
*Case Planning Process: Understands and is able to identify standards and procedures for prioritizing needs and objectives and for designing clear, concise action/service plans that address outcomes, incorporate measurable activities, and have meaning to the patient and family.					
*Case Documentation: Understands and is able to identify standards and procedures for identifying pertinent data for inclusion in case records and reports; organizing information in a clear and concise manner; writing summaries of assessment, case plan and other supporting data for the case record in a timely manner.					
*Outcome Measures: Understands and is able to identify definition and purposes of outcome measures.					
*Case Coordination: Understands and is able to utilize approaches to coordinate implementation of services, evaluate effectiveness of services to meet desired outcomes and modify plan as necessary.					

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Case Reviews: Understands and is able to identify standards and procedures for routine and timely reviews.					
*Service Contracts and Referrals: Understands and is able to identify standards and techniques for coordinating the timely delivery of services to meet identified needs, including identification of community resources, advocacy, and appropriate follow-up reports.					
*Case Termination: Understands and is able to identify criteria and procedures for effectively terminating a relationship with patient, family and support system.					
*Cross-Cultural Diversity: Understands and is able to identify differences in cultural, ethnic, and religious values, perceptions, customs and behaviors.					Cultural Sensitivity
*Cross-Cultural Interactions: Understands and is able to identify ways cultural variables can impact on an assessment as well as ways of communicating and establishing relationships with clients/families from cultural backgrounds different from one's own.					
*Stewardship: Demonstrates general understanding of patient's fiscal constraints and provision of available resources in the community to assist the patient.					Fiscal Responsibility
Cost-effectiveness: Oversees case management operations (e.g. workflow, timelines, the use of resources, costs and revenues) in order to provide services in a cost-effective manner.					

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*Community Service Network: Understands the community service network and develops relationships external to the team's disciplines.					External Relationships
Constituencies, Collaborators, and Competitors: Understands the perspectives and interests of key constituencies, collaborators, and competitors; works to build and maintain a positive public image with constituents.					
Respectful: Demonstrates a high level of respect for all constituencies.					
Information Sharing: Provides information to the community and others about the agencies and their programs and services.					
Customer Service Orientation: Understands the overall service system as well as relevant service approaches for populations of persons served.					
Demonstrates Knowledge of Resources: Demonstrates knowledge of local, regional, state and federal resources.					
Stakeholder Collaboration: Works collaboratively with both formal and informal groups of stakeholders such as Boards, Advisory Committees, advocates, family members, and personnel.					Safety and Quality
Offers a link and oversight on the complexity across settings and providers, the technology, and the increased need for accurate communication.					
Allows for the coordination of care across the healthcare system – increasing adherence to care plans and improving quality outcomes.					

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	Pre-	Post-			
*Enhances case management services and their associated outcomes by maintaining patients' privacy, confidentiality, health, and safety through advocacy and adherence to ethical, legal, accreditation, certification, and regulatory standards and guidelines, as appropriate to the practice setting. We need to emphasize the culture of safety and includes efforts that embrace the MHS goal of becoming a High Reliability Organization.					External Relationships
PATIENT FOCUS					
*Builds customer confidence, is committed to increasing customer satisfaction, sets achievable customer expectations, assumes responsibility for solving customer problems, ensures commitments to customers are met, solicits opinions and ideas from customers, responds to internal customers					
RESULTS ORIENTED					
*Sets challenging and productive goals for team, keeps team accountable for actions, and demonstrates leadership and intelligent risk- staking; provides motivation, resources and support; tracks and communicates progress.					Results Oriented

	Result	Total Post- Assessment Points (525 points max of 105 items)	Outcome
<input type="checkbox"/>		105-189	Novice
<input type="checkbox"/>		190-273	Advanced beginner
<input type="checkbox"/>		274-357	Competent
<input type="checkbox"/>		358-441	Proficient
<input type="checkbox"/>		442-525	Expert

All Competency knowledge, skills, and abilities marked in **bold** with an asterisk (*) are critical for independent professional nursing practice; they must be rated "competent" or above for the case manager to be overall "competent".

REFERENCE: BUMED Instruction 6300.17 series.

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Clinical Case Management Core Competency Summary Initial Assessment

- The case manager below has demonstrated professional competencies required to assess, plan, document, manage, coordinate, and transition the health care of beneficiaries with multiple, complex, chronic, and catastrophic illnesses or known conditions. Required skills include:
- Identifies and screens patients to determine needs and resources required for case management services.
- Performs comprehensive patient and family/caregiver needs assessments. Reassesses patients previously referred for case management, as required.
- Develops comprehensive care plans which address patient, family/caregiver's desired or expected goal(s) and outcome(s).
- Executes interventions identified in the plan of care that will lead to accomplishing/achieving goals.
- Utilizes coordination, collaboration, and communication with the patient, multi and or interdisciplinary team to implement the plan of care. Recognizes that the intensity and duration of case management services are dependent on the patient's care needs.
- Intervenes with specific actions and varying degrees of frequency and intensity along the continuum of care based on the clinical and bio-psychosocial presentation of the individual patient.
- Organizes, secures, integrates, and modifies resources and activities necessary to accomplish the patient's care plan goals.
- Recognizes key symptomology of combat operational stress, PTSD, and traumatic brain injury. Identifies need for referral/evaluation of stress reduction, psycho-education, and behavioral health interventions for the prevention of and reduction of operational stress disorders for patient and family
- Facilitates timely access to the appropriate level of care is ensured by coordinating referrals and transitioning the Veteran to VA, DOD, other Federal, state, and local home and community-based services.
- Monitors and evaluates the patient's plan of care to ensure the right patient care, at the right time, in the right place, at the right cost each and every time. Performs reassessment as necessary to ensure intervention and case management services are appropriate, effective, timely, evidence-based, equitable, and promote safety.
- Evaluates case management processes to determine intervention effectiveness, support continuous performance improvement and ensure a high quality and sustainable case management program.
- Documents care, treatment, services and plans in accordance with Joint Commission standards, accepted professional case management, social work and nursing standards of practice, and DoD, BUMED and local facility policy.
- Uses appropriate interview and communication techniques.

Treatment Facility: _____

Date Assessed: _____

Case Manager's Name: _____

Assessed Competency Result: _____

Preceptor's Printed
Name: _____

Signature: _____

File Individual Assessment in Training Record; Summary in Individual Professional File

Clinical Case Management Core Competency Re-Assessment

- Joint Commission HR.01.06.01 requires accredited organizations to assess and document staff competency once every three years, or more frequently as required by hospital policy or in accordance with laws and regulation.
- In accordance with BUMED Instruction 6300.17 (series) Navy Medicine CM competencies shall be re-assessed at least once every two (2) years or more frequently, if required by hospital policy. Re-assessment shall demonstrate professional competencies reflecting a sustained ability to assess, plan, document, manage, coordinate, and transition the health care of beneficiaries with multiple, complex, chronic, and catastrophic illnesses or known conditions. These skills include:
 - Identifies and screens patients to determine needs and resources required for case management services.
 - Performs comprehensive patient and family/caregiver needs assessments. Reassesses patients previously referred for case management, as required.
 - Develops comprehensive care plans which address patient, family/caregiver's desired or expected goal(s) and outcome(s).
 - Executes interventions identified in the plan of care that will lead to accomplishing/achieving goals.
 - Utilizes coordination, collaboration, and communication with the patient, multi and or interdisciplinary team to implement the plan of care. Recognizes that the intensity and duration of case management services are dependent on the patient's care needs.
 - Intervenes with specific actions and varying degrees of frequency and intensity along the continuum of care based on the clinical and bio-psychosocial presentation of the individual patient.
 - Organizes, secures, integrates, and modifies resources and activities necessary to accomplish the patient's care plan goals.
 - Recognizes key symptomology of combat operational stress, PTSD, and traumatic brain injury. Identifies need for referral/evaluation of stress reduction, psycho-education, and behavioral health interventions for the prevention of and reduction of operational stress disorders for patient and family
 - Facilitates timely access to the appropriate level of care is ensured by coordinating referrals and transitioning the Veteran to VA, DOD, other Federal, state, and local home and community-based services.
 - Monitors and evaluates the patient's plan of care to ensure the right patient care, at the right time, in the right place, at the right cost each and every time. Performs reassessment as necessary to ensure intervention and case management services are appropriate, effective, timely, evidence-based, equitable, and promote safety.
 - Evaluates case management processes to determine intervention effectiveness, support continuous performance improvement and ensure a high quality and sustainable case management program.
 - Documents care, treatment, services and plans in accordance with Joint Commission standards, accepted professional case management, social work and nursing standards of practice, and DoD, BUMED and local facility policy.
 - Uses appropriate interview and communication techniques.

Reassessment Date: _____

Case Manager's Signature: _____

Reviewer: _____

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