

# The Case Management Workbook

Defining the Role of Physicians, Nurses, and Case Managers

Cherilyn G. Murer, JD, CRA

Michael A. Murer, JD ♦ Lyndean L. Brick, JD

Foreword by Jill Massiet, MBA, RN

*A Road Map  
to an Effective  
Integrated  
Health System*



CRC Press

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A PRODUCTIVITY PRESS BOOK

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*This book is dedicated to all case managers, who are the unsung heroes of effective healthcare delivery. They push and they prod, they inform and they educate, they provide valuable information to physicians and families with a common goal—to assure the patient is provided care in the most appropriate venue correlative to the medical resources needed and provided.*

*Case managers are tough and resilient.*



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# Authors' Note

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This book is a sequel to *The Case Management Sourcebook: A Guide to Designing and Implementing a Centralized Case Management System*, authored by Cheryl G. Murer, J.D., CRA, President, and Lyndean Lenhoff Brick, J.D., Senior Vice President, Murer Consultants, Inc., in 1997. This updated case management workbook reflects a number of important regulatory changes that have occurred in the past 13 years, as well as the new landscape of healthcare reform.

As with the 1997 publication, Murer Consultants believes this book will serve as an important resource for case managers, administrators, physicians and others who play a role in the case management process.



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# Foreword

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In some small way I feel partially responsible for the idea behind the writing of this book. I met Cherilyn G. Murer, president and chief executive officer of Murer Consultants, while she was working on a project for the Baptist Health System in Little Rock, Arkansas, where I am the chief nursing officer. As part of a larger project, Cherilyn was on site conducting a work session with approximately 100 of my senior nurses.

After the presentation, Cherilyn provided me with a bound document of slides from the presentation she had just given to my staff. At that moment I told her, “Cherilyn, there is a wealth of information here. It ought to be a book.” Her response was, “Jill, you know, you’re right.” By the end of the day Cherilyn had called her publisher, pitched the idea, and set the wheels in motion. About a month later when Cherilyn was back at our facility, she shared with me that she had laid the groundwork for this book with a focus on the role of nursing in effective case management. She asked if I would write the Foreword for this book, and of course I told her I would be honored.

During the work session that day with the nursing staff, I believe Cherilyn hit home as she pointed out the important role of nursing in the case management process. She stated that nurses interact with the patient every day and know the patient far better than anyone else. Nurses are aware of post acute venues and generally know when a patient is ready to move to the next level of care.

There are far more nurses than other health professionals in any health system, and in most cases nurses outnumber the case management staff 25 to 1. Who better to be the *eyes and ears* of case management than we, the nurses?

Not only did the presentation have an impact on me that day, but there also seemed to be an *awakening* of the nurses at our facility. As Cherilyn explained, nursing plays a pivotal role in case management. Since her presentation, there has been greater interaction between the nursing staff and the case managers. Collectively, these two groups began working as a team and, in conjunction with the physicians, began to focus on discharge planning on day one of admission.