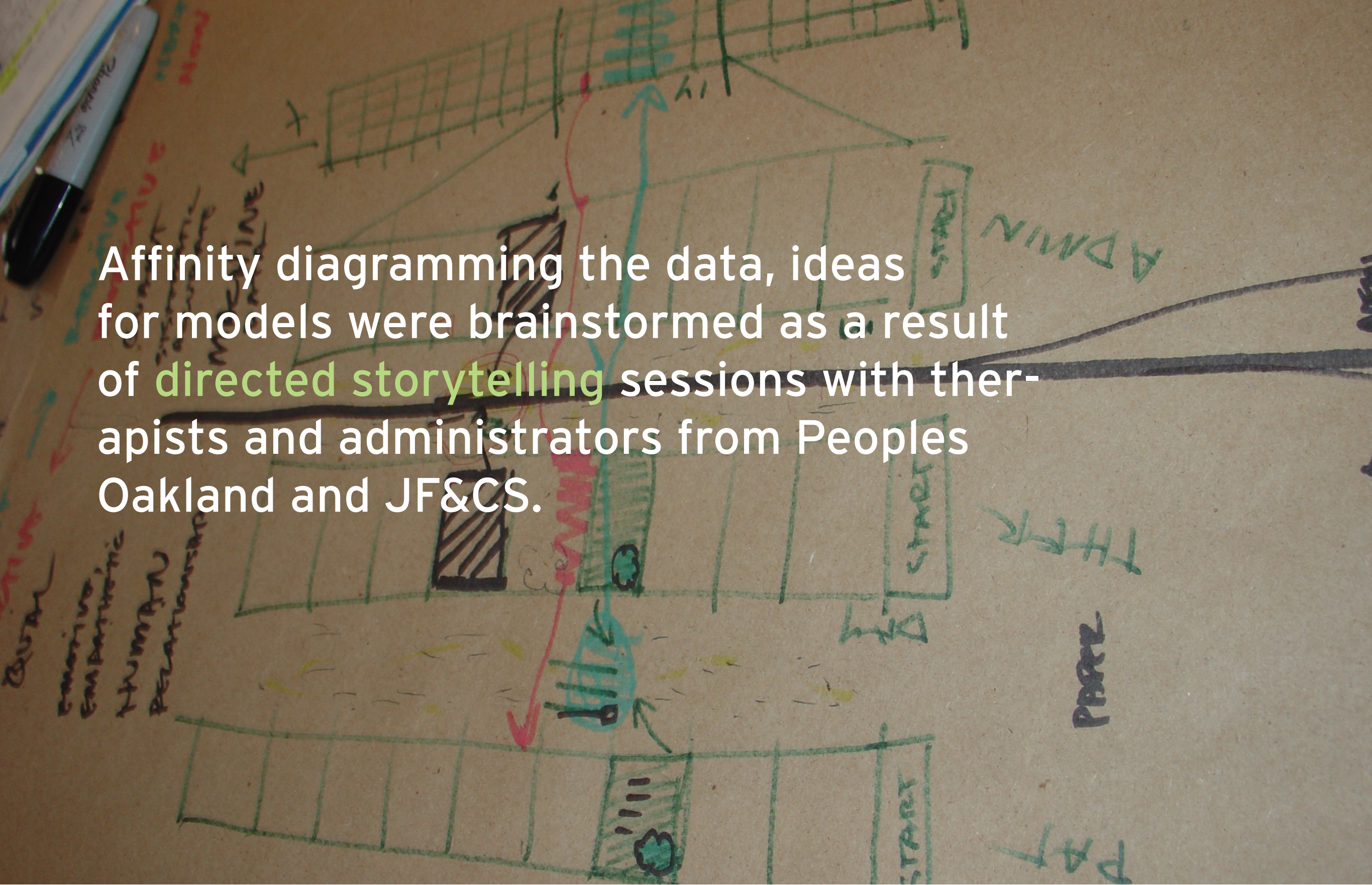# case management & patient care
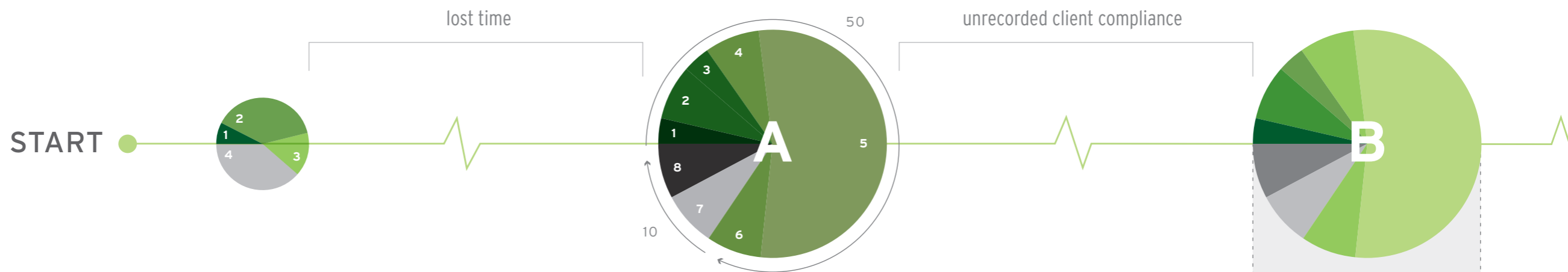
hunt statement

''We are going to understand how health care case managers manage cases today in order to design a more intuitive system that allows these professionals spend more time helping people.''

Affinity diagramming the data, ideas for models were brainstormed as a result of directed storytelling sessions with therapists and administrators from Peoples Oakland and JF&CS.

START

lost time

50

unrecorded client compliance

A

5

10

B

Initial Registration
1) client enters/calls/connects
2) completes required papers
3) submits papers
4) reception checks in client

Typical Session
1) client enters
2) receptionist
3) moves to session room
4) treatment plan review
5) relationship
6) client chart/goals/next appt.
7) synopsis of goals
8) notes to reflect on goals

assess
therap
goals
treatm
sessic

patient
Year / Life Timeline

START

DEATH

lost time

unrecorded client compliance

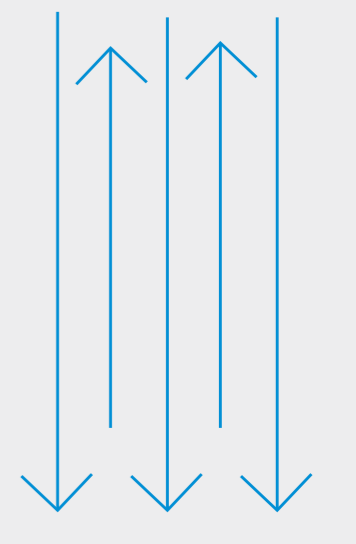A   B   C   X

assessment
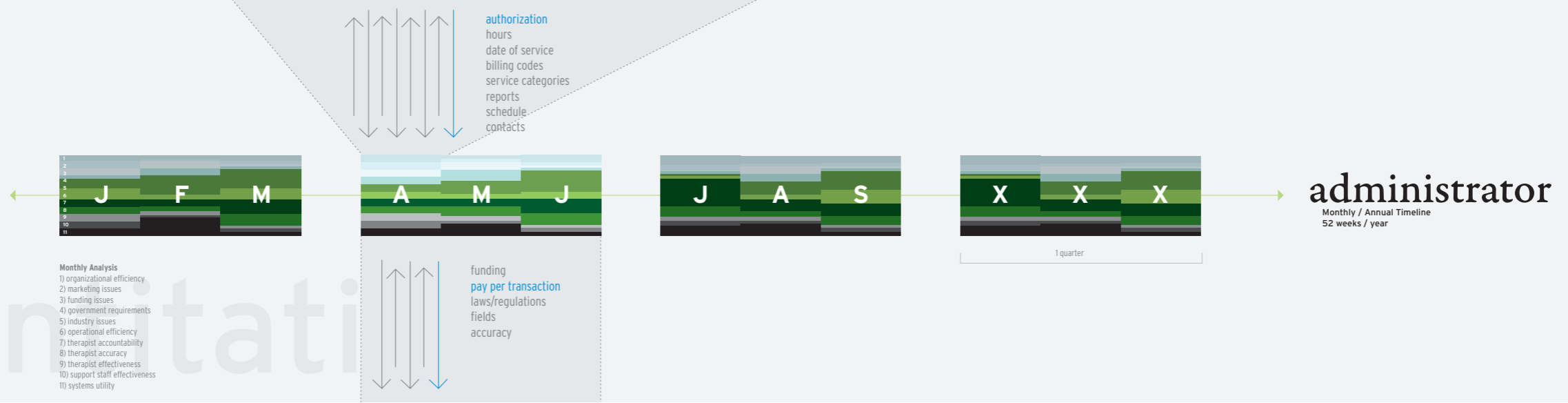therapy
goals
treatment plan
session notes

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Unstructured Session
1) client enters
2) client / therapist interaction
3) client / interaction

Session Overlap
1) goals in use in social setting

therapist
Day Timeline
37.5 hours / week

variable time

9   10   11   12   2   3   4

8 hour day

variable time

Pre-work
1) set up workspace
2) pre-screen work
3) personal needs
4) complete overdue work

assessment
progress report
hours
attendance

Typical Session
1) client enters
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8) notes to reflect on goals

Mid-Day Break

Possible Unstructured Session
1) client enters
2) client / therapist interaction
3) therapist / therapist interaction

Post-work
1) sort our notes
2) enter time and notes
3) personal needs
4) close down workspace

assessment
progress report
hours
attendance

TOOLS

calendar   monthly report   timesheet   schedule   paper   billing code

email   contacts   consent form   folders

authorization
hours
date of service
billing codes
service categories
reports
schedule
contacts

administrator
Monthly / Annual Timeline
52 weeks / year

J F M A M J J A S X X X

1 quarter

Monthly Analysis
1) organizational efficiency
2) marketing issues
3) funding issues
4) government requirements
5) industry issues
6) operational efficiency
7) therapist accountability
8) therapist accuracy
9) therapist effectiveness
10) support staff effectiveness
11) systems utility

funding
pay per transaction
laws/regulations
fields
accuracy

lost time

50

unrecorded client compliance

A

10

B

assessment
therapy
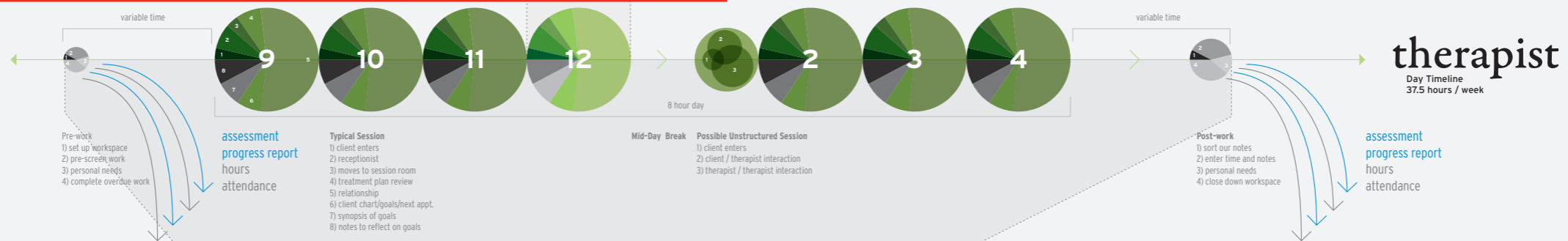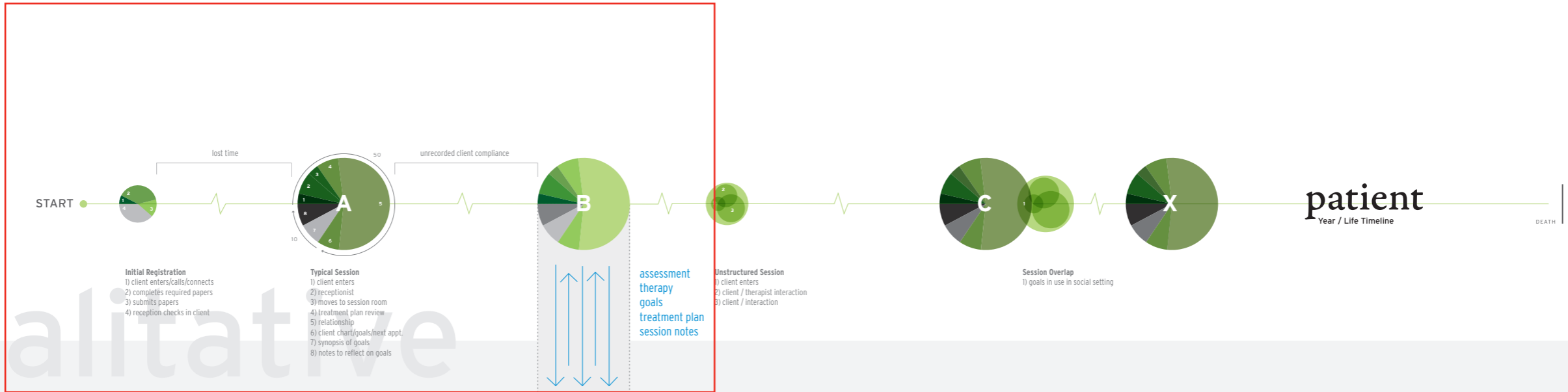goals
treatment plan
session notes

C

Initial Registration
1) client enters/calls/connects
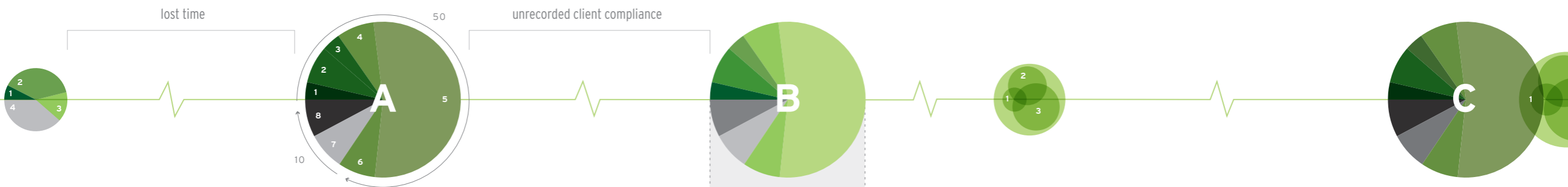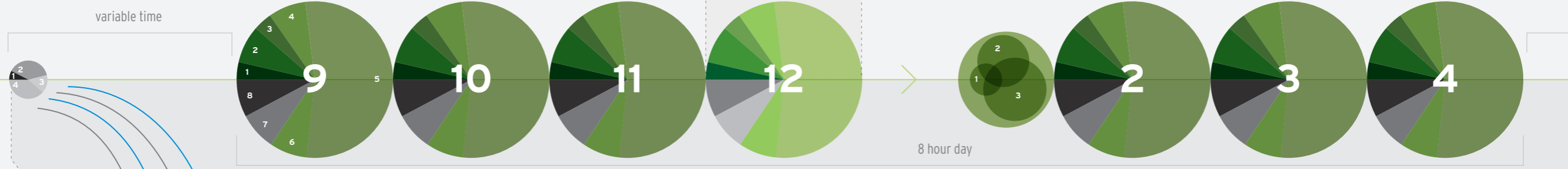2) completes required papers
3) submits papers
4) reception checks in client

Typical Session
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Unstructured Session
1) client enters
2) client / therapist interaction
3) client / interaction

Session
1) goals i

variable time

9

10

11

12

2

3

4

8 hour day

assessment
progress report
hours
attendance

Pre-work
1) set up workspace
2) pre-screen work
3) personal needs
4) complete overdue work

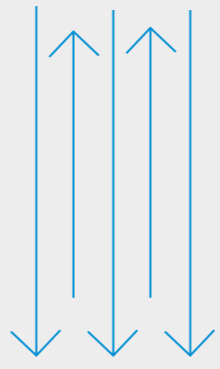**Typical Session**
1) client enters
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Mid-Day Break

Possible Unstructured Session
1) client enters
2) client / therapist interaction
3) therapist / therapist interaction

variable time

9 **10** **11** **12** **2** **3** **4**

8 hour day
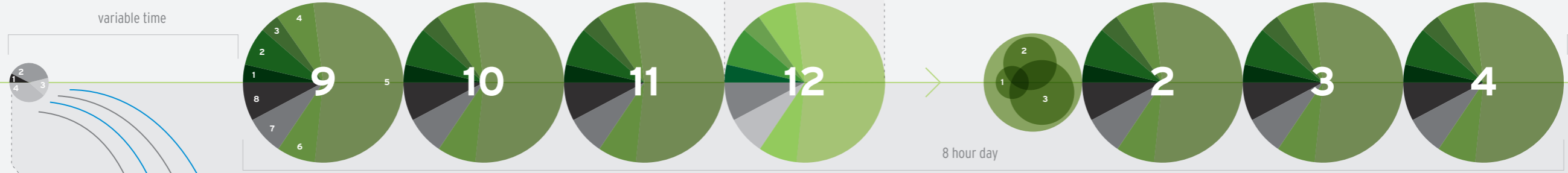
Pre-work
1) set up workspace
2) pre-screen work
3) personal needs
4) complete overdue work

assessment
progress report
hours
attendance

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Mid-Day Break

Possible Unstructured Session
1) client enters
2) client / therapist interaction
3) therapist / therapist interaction

calendar
monthly report
email
timesheet
schedule
paper
contacts
consent form
billin

authorization
hours
date of service
billing codes
service categories
reports
schedule
contacts

J **F** **M** **A** **M** **J** **J** **A** **S** **X**

Monthly Analysis
1) organizational efficiency
2) marketing issues
3) funding issues
4) government requirements

funding
pay per transaction
laws/regulations

J **F** **M**

A **M** **J**

J **A** **S**

X

Monthly Analysis
1) organizational efficiency
2) marketing issues
3) funding issues
4) government requirements
5) industry issues
6) operational efficiency
7) therapist accountability
8) therapist accuracy
9) therapist effectiveness
10) support staff effectiveness
11) systems utility

funding
pay per transaction
laws/regulations
fields
accuracy

Q1

Q2

X

ELDERLY SERVICE

Quarterly Analysis
Per organization, there will be a
variety of issues that need to be
tracked. Since we do not have explicit
data on this section, the bars above
are meant to suggest the inclusion of

patient
Year / Life Timeline

START — lost time — unrecorded client compliance — A — B — C — X — DEATH

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assessment
therapy
goals
treatment plan
session notes

Unstructured Session
1) client enters
2) client / therapist interaction
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Session Overlap
1) goals in use in social setting

qualitative

therapist
Day Timeline
37.5 hours / week

variable time — 9 — 10 — 11 — 12 — 2 — 3 — 4 — variable time

8 hour day

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Possible Unstructured Session
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4) close down workspace

assessment
progress report
hours
attendance

TOOLS
calendar email monthly report timesheet schedule paper contacts consent form billing code folders

authorization
hours
date of service
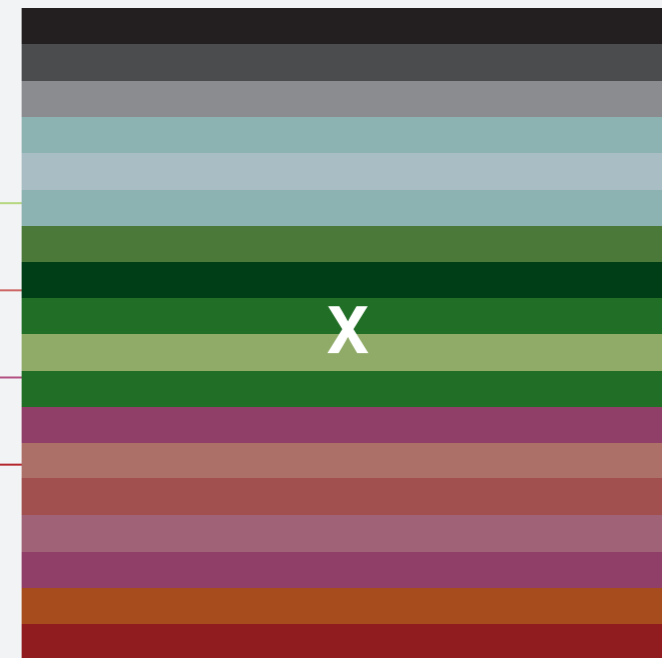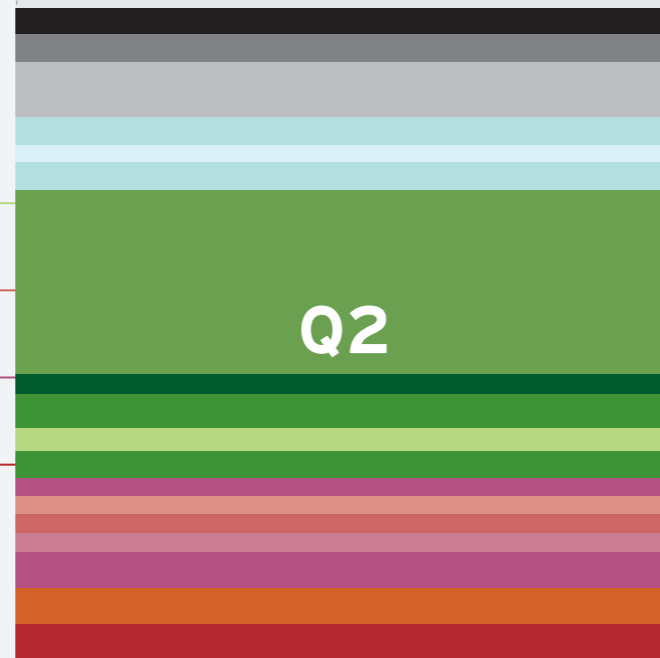billing codes
service categories
reports
schedule
contacts

administrator
Monthly / Annual Timeline
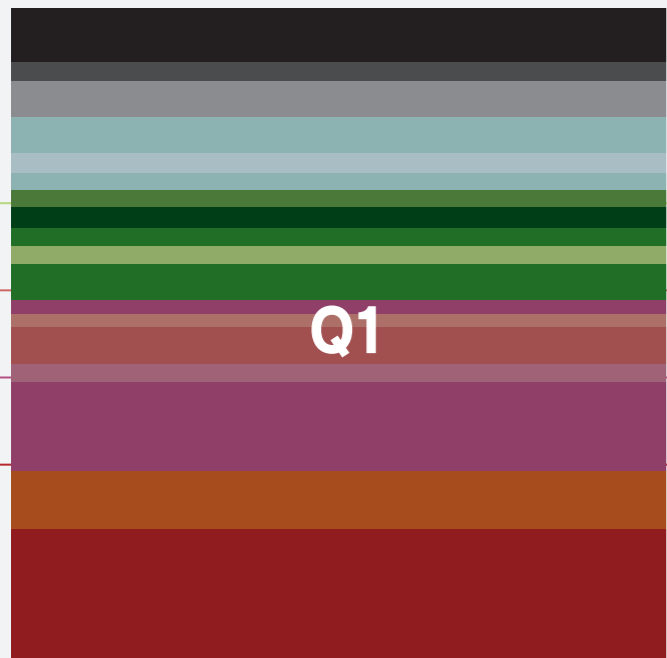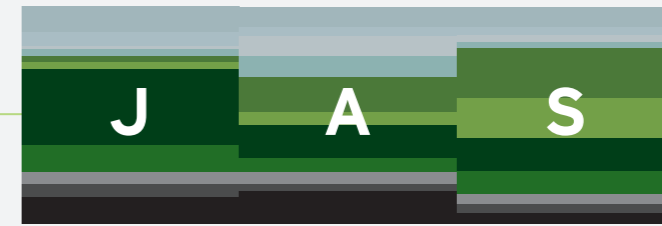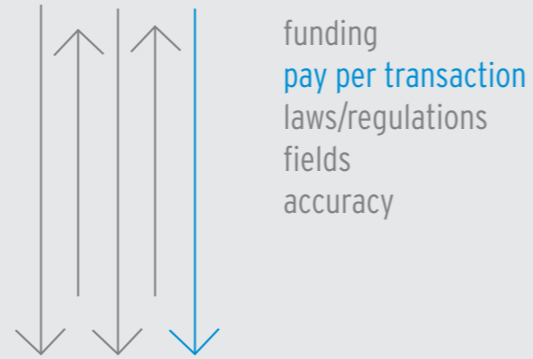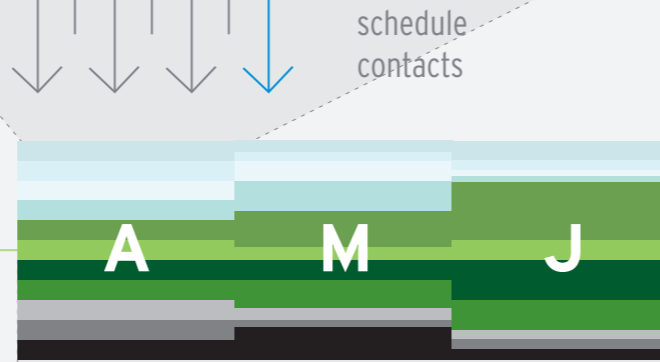**52 weeks / year**

J F M — A M J — J A S — X X X

1 quarter

Monthly Analysis
1) organizational efficiency
2) marketing issues
3) funding issues
4) government requirements
5) industry issues
6) operational efficiency
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8) therapist accuracy
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funding
pay per transaction
laws/regulations
fields
accuracy

qualitative

organization
Fiscal Year Timeline

Q1 — Q2 — X

COUNCELING SERVICES
CHILD SERVICES
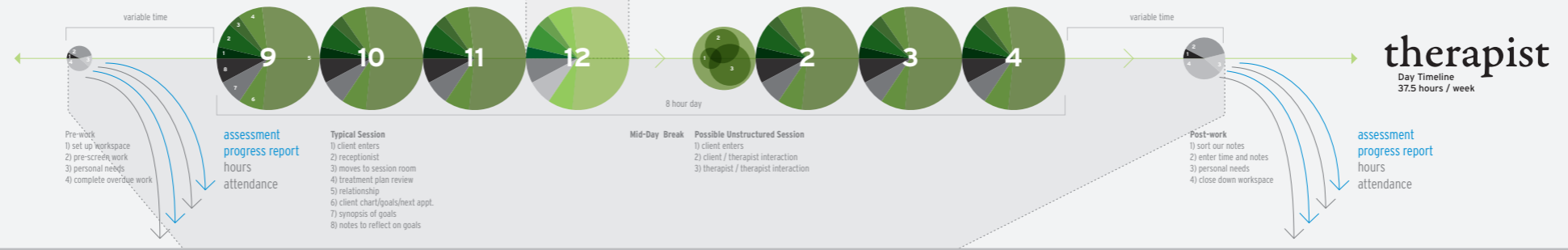CRISIS & REFERRAL SERVICE
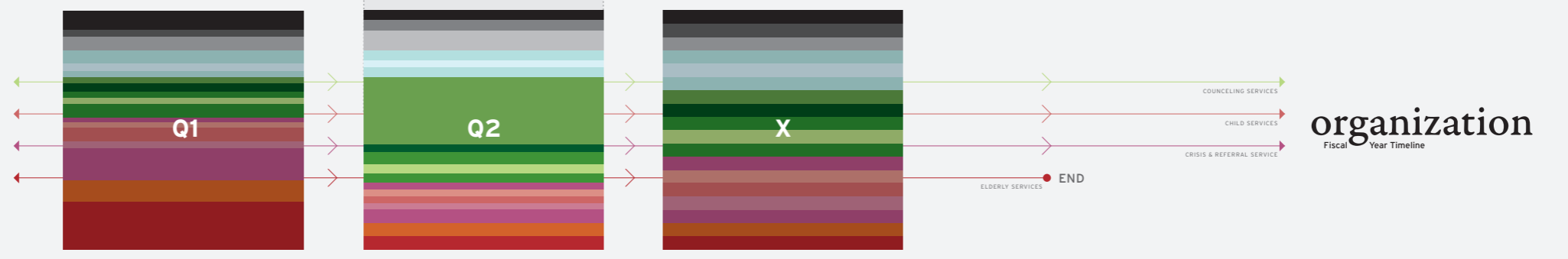ELDERLY SERVICES — END

Quarterly Analysis
Per organization, there will be a variety of issues that need to be tracked. Since we do not have explicit data on this section,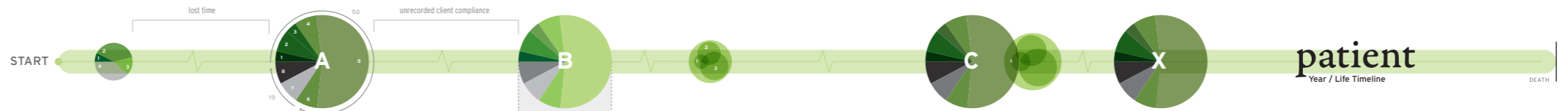 the bars above are meant to suggest the inclusion of issues addressed at the administrator level while suggesting values from other divisions in the organization.

requirements
specifications
regulations

government

qualitative

patient
Year / Life Timeline

START

lost time

unrecorded client compliance

A

B

C

X

DEATH

5.0

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37.5 hours / week

variable time

variable time

9   10   11   12   →   2   3   4
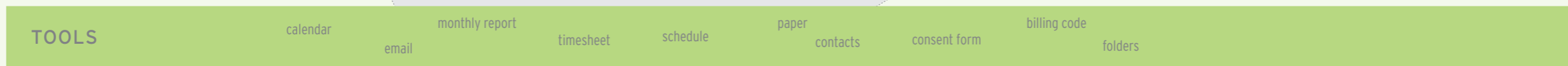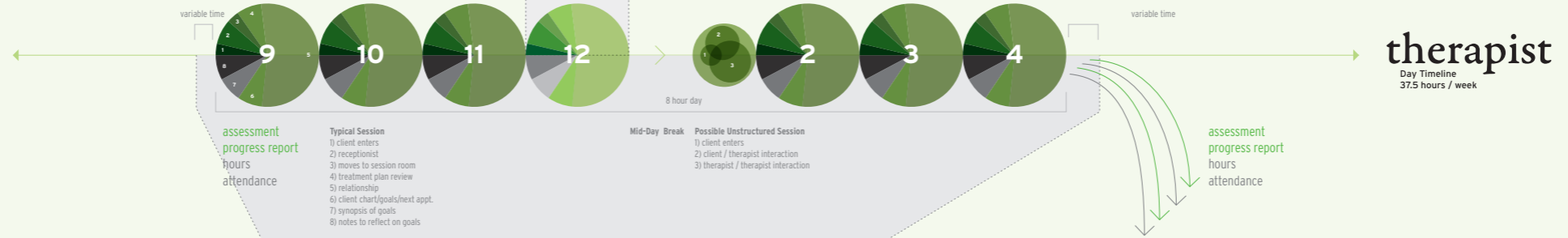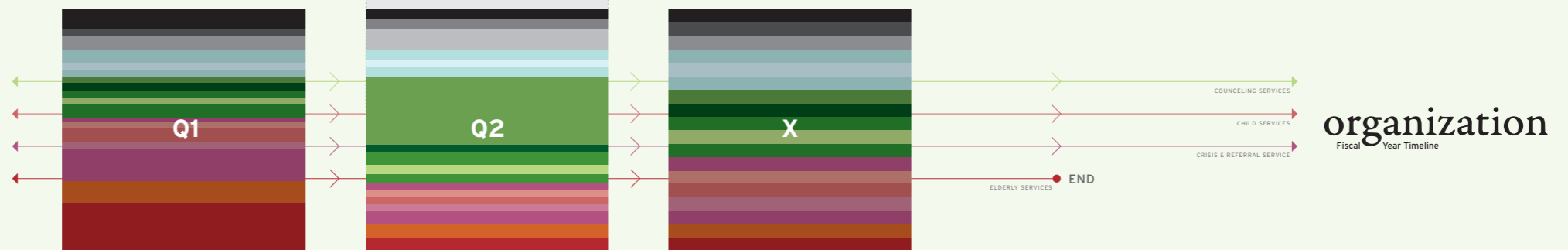
8 hour day

assessment
progress report
hours
attendance

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assessment
progress report
hours
attendance

TOOLS

calendar

monthly report

timesheet

schedule

paper

contacts

consent form

billing code

folders

email

authorization
hours
date of service
billing codes
service categories
reports
schedule
contacts

administrator
Monthly / Annual Timeline
52 weeks / year

J F M   A M J   J A S   X X X

1 quarter

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pay per transaction
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accuracy

qualitative

organization
Fiscal Year Timeline

Q1   Q2   X

COUNCELING SERVICES

CHILD SERVICES

CRISIS & REFERRAL SERVICE

ELDERLY SERVICES   ● END

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requirements
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