

## Mr. Lawson Case Study: Care Management Process      Activity 8

### Directions:

- *Read the case study below.*
- *Together, you and your clinical team will apply the Care Management Process: referral, screening, enrollment, management, case closure.*
- *Keep in mind the outside resources, and the clinical-community linkages that may exist or new ones that may be beneficial.*
- *Discuss each question below.*
- *After your group completes this case study activity, each group will report out. Within your group please identify a scribe and a person who will report out.*

You find Mr. Lawson's record while reviewing the morning's Admission Discharge and Transfer (ADT) list. Mr. Lawson is a 68-year-old male who was just discharged from the hospital for an exacerbation of COPD and extreme fatigue. You have access to his PCP medical record as well as the inpatient chart. Per office protocol, you schedule a transition of care phone call to Mr. Lawson.

### Background obtained from medical records.

Mr. Lawson has a history of COPD, smoking and uncontrolled HTN. He has been hospitalized 2x in the past year. During his most recent hospital visit, a routine X-ray revealed a large mass in his left lower lung. He was discharged with home O2, new prescriptions and an oncology consult. His PCP medical record also reveals that he is retired and lives at home with his wife, who does not work and suffers from her own health needs. He stated at his last office visit that he receives monthly social security but that his pension was cut off a few months ago. His immediate relatives live out of state.

### You perform your transition of care phone call.

During the post-discharge phone call to Mr. Lawson, he admits he really has not been taking care of himself which led to the hospitalization secondary to not taking his medications and his continued smoking. He states that the diagnosis of the lung mass scares him and he doesn't know what he is going to do. He goes on to tell the care manager that he is the caregiver of his grandchildren ages 5 and 9, ever since his daughter passed away three months ago. His daughter was living with them at the time and provided financial assistance. He struggles to make ends meet since his pension from the steel worker union stopped and all he receives is \$800 per month in social security. This has led him to make choices between filling his prescriptions, paying the heating bill, or buying groceries. His wife also receives \$700 in social security per month, however they still have trouble making ends meet. He is fearful of losing his home and concerned about who will take care of the grandchildren when he and his wife are



no longer here. He currently has Medicare however he did not sign up for part B or prescription coverage and does not know how he is going to pay for the new prescriptions. Mr. Lawson agrees to come in for a visit.

**During the initial visit you complete a comprehensive assessment**

**You meet with Mr. Lawson for 40 minutes** in the clinic. He was late for the appointment stating he has unreliable personal transportation and at times has to rely on neighbors to get around. During the visit he opens up more about his health and what is going on in his life. He begins to talk about the lung mass that was found and that he has yet to tell his wife for fear of causing her more distress and anxiety. The hospital did not give him much information except to follow up with an oncologist. Mr. Lawson admits he hasn't seen his physician in over 1 year. He admits he doesn't read very well and was very confused about the discharge instructions he was sent home with. He is trying to do his best, to keep things together for his family. After your visit with Mr. Lawson you discuss the case with the PCP. Mr. Lawson agrees to meet with you in one week.

**Billing Code**\_\_\_\_\_.

**The following week**

**You have a 20-minute phone call with Mr. Lawson.** What might you discuss with Mr. Lawson at this time?

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**Billing Code**\_\_\_\_\_.

**One week later**

**You meet with Mr. Lawson in the office for 30 minutes.** What might you discuss with Mr. Lawson during this time?

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**Billing Code**\_\_\_\_\_.

**Two Weeks Later**

You call Mr. Lawson to check in. **During the 20-minute phone call** what information is discussed?

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**Billing Code**\_\_\_\_\_.

## Case Study – Five Step process

### Step One: Referral:

### Step Two: Screening:

- What screening information from the PCP medical record and the inpatient chart would you obtain before the visit?
- Is Mr. Lawson a candidate for care management?

### Step Three: Enrollment & Engagement:

- What areas of the comprehensive assessment might you focus on with Mr. Lawson?

### Step Four: Management and Interventions:

- What problems are noted from the assessment? What actions would you take? What team members would you involve?
- Of the problems noted what might be the biggest priority for Mr. Lawson?
- What are potential short and long term goals?

### Management-Follow up:

- What follow-up plan do you establish with Mr. Lawson?
- What would you plan/do for follow up?

### Step five- Case Closure:

- When would you consider closing this case?