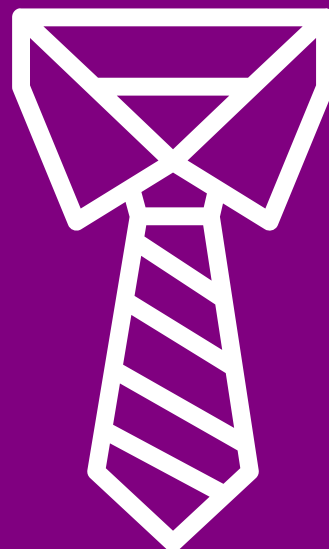


What You Need to Know About Case Management: And the digital capabilities that make case management techniques more effective



A brief history of case management

What is case management, exactly? Outside of the healthcare and social assistance sectors, there could be some ambiguity. The precise meaning of the term case management often eludes those in other industries, such as emergency management and work safety management, who most stand to benefit from implementing the practice.

Case management first emerged as a managed care technique, specifically in advanced healthcare and social assistance systems. The novelty it offered as a practice was simple: a more “holistic” means of handling patient care.

As designed, case management more fully accounted for extra-medical factors like physical, emotional, financial, psychosocial, and behavioural needs, as well as related support systems.

Since its inception, though, case management has broken out of the narrow confines of healthcare and social assistance. It has made important forays to disaster, emergency, and safety management (among other sectors), as well as regulatory compliance. The question is why.

Case management is a process of systematic problem solving

Well, at its core, case management is all about solving problems, especially gathering information (among other resources) and getting it distributed quickly. Case management can be understood as a collaborative work method (constituting multiple phases) to link people to the relevant and available resources they need to attain pre-determined goals. The problems themselves are deemed cases, representing pieces of work that deliver tangible business outcomes for a customer, employee, partner, or other stakeholder.

To business owners, that might sound like a task. But there are important distinctions between cases and tasks:



Cases yield concrete business outcomes.



Cases are the end-objects that get worked on.



Tasks are mostly fixed-term assignments that need to be completed in order to close a case.

Key information management benefits of case management

So, what are the benefits of case management to potential practitioners, such as safety, risk, compliance, and emergency managers? Well, these practitioners will often need to get lots of information gathered and distributed quickly.

Case management is useful, here, because it's fundamentally adaptive, applicable to diverse types of complex, unpredictable work, all involving the accessing of fragmented resources (often data) to meet the fast-changing needs of clients.

Case management interventions form the link between the client and the service delivery system to yield better, faster outcomes. How, exactly? Well, practitioners (i.e., case managers) are enabled to more efficiently interact with the wider environment of information, resources, and services. In turn, those practitioners make more accurate decisions throughout the lifecycle of the case, which creates a better service experience for clients.

Of course, the core use cases that stand to benefit the most from these case management techniques have something in common:



Data overload. Not just that. But relevant information is also spread across multiple, siloed databases (and channels), making it difficult to access the right information when it's needed most.



Multiple, related investigations taking place at the same time, with little transparency between them.



A use case in which collaborating on a single work-object involves communicating across multiple channels.

In the above scenarios, work tends to rely on manual processes and systems that have become progressively more complex and convoluted. As a result, data hygiene suffers. So too does the ability of business owners to productively collect details and information in support of the case.

Zooming out, precise examples of the areas in which case management interventions can yield the highest dividends include:



Regulatory compliance, where case management techniques can help ensure that organisations handling cases remain compliant with laws, policies, and procedures



Claims management, where case management techniques can enable the fulfillment of complex claims, which involve the collection and consideration of vast quantities of information



Facilities management, where case management techniques can help with the efficient maintenance of complex, large-scale assets, including facilities spread across multiple locations



Emergency response and disaster welfare relief, where case management techniques and capabilities can help better engage field workers about ongoing incidents



Safety and Human Resources grievances, where case management techniques help guarantee that all incidents (e.g., return to work and worker's compensation) are handled according to pre-set policies and procedures

Key functions of case management

Of course, the benefits of case management techniques don't just happen, even if those benefits are applicable to diverse types of work. To be effective, case management involves multiple collaborative phases. Those case management phases typically include:



Screening to determine whether a client would benefit from case management services



Assessing involving the collection of information about a client's situation, similar to those reviewed during screening, but at greater depth



Stratifying risk to determine the appropriate level of intervention



Planning to determine specific objectives, goals, and actions designed to meet the client's needs as identified through the assessment process



Implementing or executing specific activities and/or interventions that will lead to accomplishing the goals set forth in the case management plan



Following-up focuses on review, evaluation, additional monitoring, and reassessment of the client



Transitioning (in a clinical context) to mitigate the risk of errors occurring when patients are transferred from care settings



Communication post-transition serves as a follow-up to determine how things are going



Evaluation or final assessment of the case management plan, with its effect on the client measured

What kind of technology makes case management techniques more effective?

In practice, the phases above rarely unfold linearly. Business owners seldom complete a phase absolutely without returning to it in some fashion. That's because the underlying business activity – be it disaster welfare granting, investigating safety and security incidents, or claims compensation – is so fluid and complex.

Indeed, the very unpredictable nature of the unpredictable work to which case management provides greater efficiency and transparency serves as a reminder that effective case management isn't easy. The main challenges include:

1 Resources are often limited; and

2 When resources are available, accessing them depends on overcoming crude information-sharing pathways

Fortunately, digital case management technology can help better manage and improve the details of how work gets done in the context of that work's desired outcome. By automating key facets of unpredictable work, digital case management technology increases visibility into complex operations, improves collaborations, and facilitates better stakeholder engagement.

Though a marked improvement over manual processes and systems (i.e., spreadsheets), case management systems aren't a cure all. After all, not all technology is created equal. In fact, many systems don't offer much more than workflows that manage the receipt, routing, and reporting of work.

Enabling the automating of the response and resolution of unpredictable works calls for much more robust functionality to manage all intelligence and case management incidents affecting a given organisation. Key system capabilities to look for include:



Intelligence teams & cases dashboards. Robust dashboards to summarise all incidents, team tasks and actions, and case management information.



Configurable forms for cases, targets, subjects, or investigations. Highly configurable forms allow you to ensure the right information is always captured.



Case event & decision logging. Easily capture case occurrences and log details and follow-up tasks and actions.



Tasks, communications & notifications. Easily assign tasks and communicate with stakeholders and personnel about incidents and operations.



Investigation teams, roles & team activation. Manage your investigation teams, set back up roles, and activate & confirm teams instantly.



Intelligence briefs & reporting. Capture intelligence briefs and related information for inclusion in reports and documents.



Configurable workflows for cases, investigations & report production. Create robust, configurable workflows to automate your business processes.



Mobile collection of intelligence, communications & field agent tracking. Comprehensive mobile app allows you to take your intelligence and case management operations on the go and always know where your field agents are.



People, capability & contact management. Track key personnel alongside their capabilities and qualifications to ensure the right people are assigned to the right tasks.



Event mapping & case data analysis. Robust information tracking and reporting capabilities allow you to capture and distil all incident information into actionable reports and analytics.



Kanban boards for tracking production of intelligence products. Ensure intelligence products are produced quickly and correctly every time.

Finally, there are many definitions of case management. But at its core, case management is simply a way of helping people identify the areas where they need help and connecting them to the personnel and resources that will help them.

As a systematic problem-solving process, case management offers business process owners a way to perform unpredictable work more efficiently, by gathering and distributing information quickly and effectively.

The challenges to effective case management, however, can't be understated, especially resource limitations and frictions in information sharing. The right technology, like intelligence and case management software platform, Noggin, helps business process owners overcome those challenges, so as to get complex work completed quicker, with happier stakeholders. Keen to learn more? Request a demo of our product.



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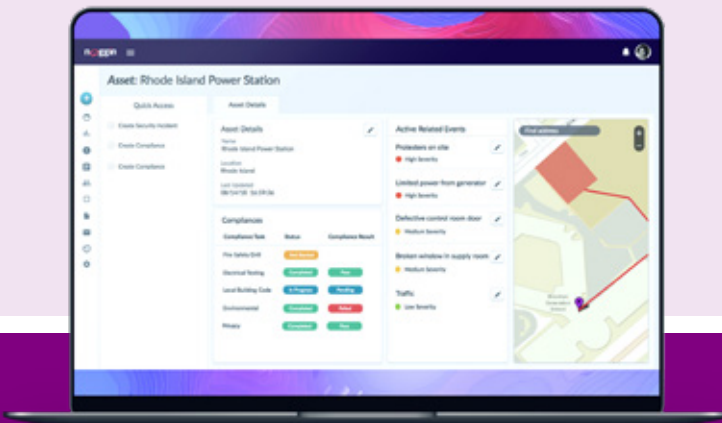
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for Case Management

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Meet the next-generation tool for corporate crisis and business continuity management teams to collaborate, plan, track their response, and share information. Built on the Noggin Core platform, Noggin Case Management gives response teams and decision makers the tools to know what's happening, collaborate quickly and effectively, make better decisions, and enact the right plans to take action when it counts the most.

The Noggin Case Management solution pack is backed by the Noggin Library with hundreds of plans and best-practice workflows, out of the box, and installed in minutes.