OTA in Care Coordination

Essentials – Ch. 23: Case Management & Coordination

- Care coordination is the function; it entails looking at the big picture, assessing needs and goals, identifying resources, and efficiently coordinating services to best meet the client’s needs.

- An individual’s health care needs often change based on a variety of factors, including nature of condition, age, availability of services, environmental factors, and individual choices.

- Occupational therapists evaluate occupational performance, routines, and volition as these factors interact with the client’s environment.

- The client’s medical, spiritual, and psychosocial needs are holistically considered.

- All factors, including family interaction, environment, and response to illness and intervention measures, are critical when determining a person’s ability to engage in meaningful occupations.

- Accurate assessment is critical in the application of reasonable clinical pathways.

- Occupational therapy embraces education as a vital step in including the client in the decision-making process.

- Awareness of cultural differences; medical, spiritual, and psychosocial needs; unique gender and role beliefs; and generational norms are essential to person-centered planning.

- Within the current system, which demands cost effectiveness, the client’s needs must be considered foremost.

- An effective interdisciplinary team requires solid communication skills, the ability to resolve conflict, and respect for each team member’s role.

- The six essential case management activities: assessment, planning, implementation, coordination, monitoring, and evaluation.

- Occupational therapists are likely to be the only professionals analyzing all factors influencing a client to determine how to build supports that are truly compatible.

- The cornerstone of a healthy team process must be consumer driven and all parts must be well matched.

- Example of OT as a case manager
  - Clear identification of strengths and weaknesses in the areas of sensory processing, perceptual abilities, and cognitive learning style allows the team (OTCRS) to use the dynamic process in a truly client-centered approach.
• The goal of case management is to manage limited resources

• Three important differences between a traditional case manager and an OT as a case manager:
  o Our ability to understand functional abilities needed to match the person to the task
  o Our occupational analysis skills, which allow us to adapt and be creative with support systems and solutions
  o Our ability to guide support providers to facilitate effective interventions