

**ADVANCING CASE MANAGEMENT'S
HEALTH EQUITY PILLARS
FOR SERIOUS ILLNESS (HEP-SI)**

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CHANGE REMAINS THE ONLY CONSTANT



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LEARNING OBJECTIVES

Attendees of this presentation will be able to:

1. Identify health equity challenges faced by case managers in working with patients (and their families) diagnosed with serious illness (e.g., chronic, life-limiting, and terminal illnesses).
2. Explore the intersections between health equity, social determinants of health, and serious illness.
3. Apply case management's *Health Equity Pillars for Serious Illness (HEP-SI)* to practice population.
4. Cite relevant case management's established resources of guidance (e.g., professional regulations, standards of practice, ethical codes).

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DISCLAIMER 2

The data provided in this presentation is meant to inform your efforts, though it may also elicit strong emotions.

My primary goal is always to educate and advance the perspective of our workforce. It is your individual choice how the data and model guide your actions moving forward

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THE INTERSECTION OF HEALTH EQUITY, THE SOCIAL DETERMINANTS OF HEALTH, AND SERIOUS ILLNESS

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Health Equity

"The consistent and systematic treatment of all individuals in a fair, just, and impartial manner, including individuals who belong to communities that have been denied such treatment, such as Black, Latino, Indigenous and Native American, Asian American, Native Hawaiian, and Pacific Islander persons and other persons of color; members of religious minorities; lesbian, gay, bisexual, transgender, queer, and intersex (LGBTQI+) persons; persons with disabilities; persons who live in rural areas; persons who live in United States Territories and persons otherwise adversely affected by persistent poverty or inequality; and individuals who belong to multiple such communities."

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ALIGNMENT

Social Determinants of Health

The conditions in the environments in where persons are born, live, work, play, worship, and age that affect a wide range of health and mental health functioning, quality-of-life outcomes, and risks.

(CDC, N.D.)

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WE'VE GOT LOTS OF INTERSECTIONS

(Cree, 2020; IVMF, 2024; Sheps Center, 2024; U.S. Dept. HUD, 2023; Wallace et al., 2023; Wan et al., 2020; Williams et al., 2020)

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POPULATION-BASED CARE GAPS

Black: 19

Hispanic: 45

Asian American, Native American, Pacific Islander: 84

White: 76

(Radley et al., 2024; NCI, 2024)

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PAIN MANAGEMENT DISPARITIES

50M

74%

64%

10%

>50%

Pain is a universal experience, though gets an inequitable response
 "Racial minorities and vulnerable populations experience additional suffering because of inadequate pain care resulting from disparities in access and treatment."
 (Nguyen et al., 2023; OIG, 2018; Wang & Jacobs, 2023)

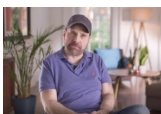
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IMPLICIT, EXPLICIT, OR JUST PLAIN BIAS?

"Men who have other marginalized identities, like being poor, BIPOC, or queer, that make them less socially powerful may indeed experience medical gaslighting....."

I came down with a mystery flu-like illness at 9 years of age, and it took 2 years to finally get a rheumatoid arthritis (RA) diagnosis.





Doctors told my mother that I didn't have RA—but something called 'too much mothering.' There were times when I almost died due to not getting the meds I'd been told I would get. This was because the nurses and the attending doctor took it upon themselves to decide that I was taking too many pills, even though none of them had known me longer than a week."



(Dan Malito to Gillespie, 2023)

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SERIOUS ILLNESS DISPARITIES, CONCORDANT CARE, AND PROVIDER TRUST: ASCO POLICY STATEMENT ON CANCER CARE DISPARITIES

-  Ensure equitable access to high-quality health care
-  Ensure equitable access to research
-  Address structural barriers
-  Increase awareness and actions

(Patel et al., 2020)

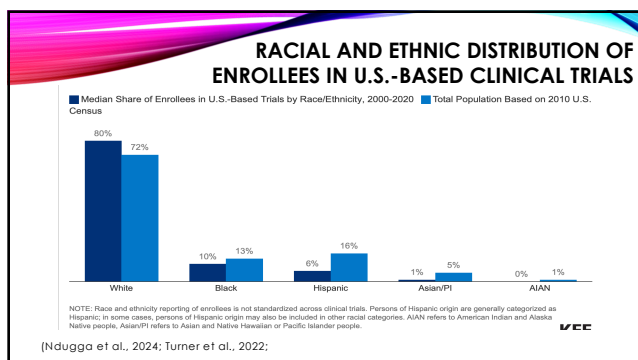
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HOW CAN YOU KNOW WHAT TO FIX, WHEN YOU DON'T ACCURATELY MEASURE WHAT EXISTS?

Incidence (new cases)	Prevalence (all existing cases)	Mortality (deaths)	Morbidity (cancer-related health complications)
Survivorship, including quality of life after cancer treatment	Financial toxicity of cancer or related health conditions	Screening rates	Stage at diagnosis

(NCI, 2024)

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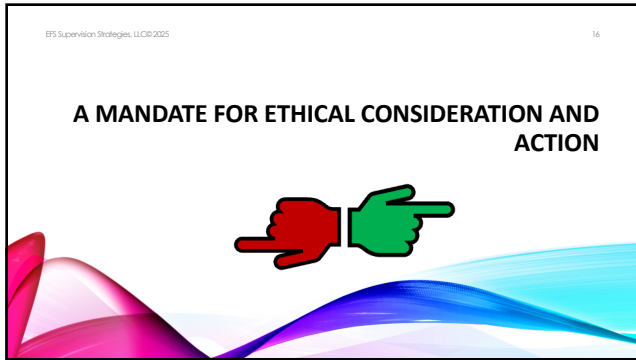
CONSIDER THIS

N=730 women who underwent Breast Cancer Screening (368 White, 362 Black):

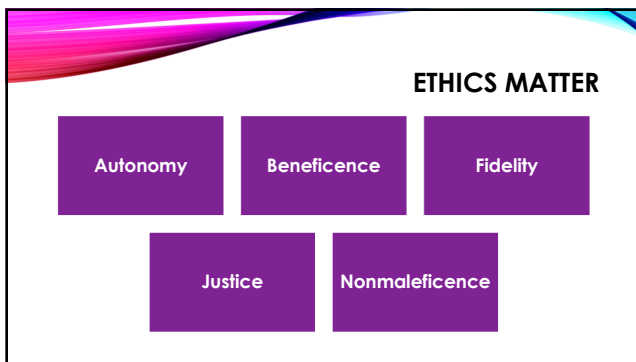
- Median number of days for each time interval of total delay:
 - 60% higher for Blacks
 - 42 days: Blacks
 - 26 days: Whites
- Women in lower SES neighborhoods (20%–100% poverty) had longer median number of days of total delay to diagnosis vs. women in higher SES neighborhoods (0%–10% poverty).
 - 42 days: Blacks
 - 28 days: Whites
- Uninsured women had the longest median number of days of total delay: 44.5 days

(Miller-Kleinhenz et al., 2022)

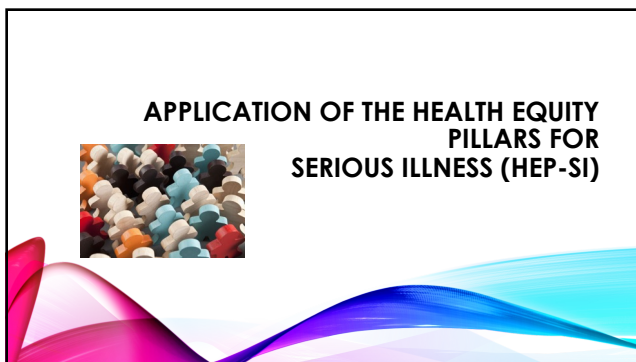
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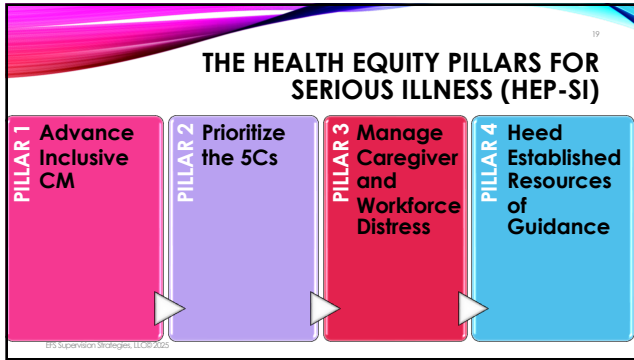
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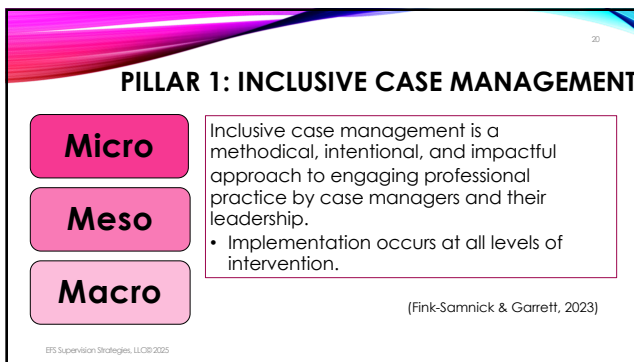
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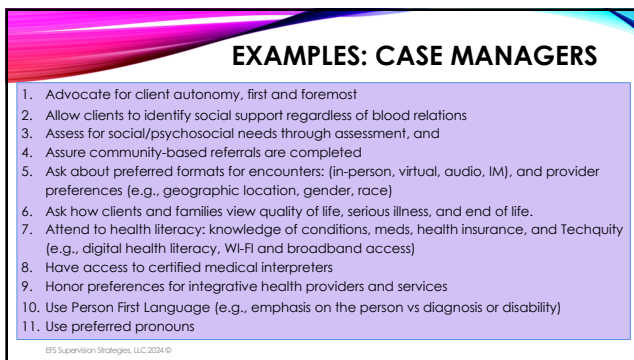
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EXAMPLES: LEADERSHIP

1. Available accommodations for clients with physical, cognitive, intellectual, mental health disabilities, and
2. Health education materials in multiple languages, formats, platforms (e.g., apps, flyers, infographics, Braille, audio)
3. Comprehensive, accessible, understandable, and inclusive benefit programs
4. DEI-specific policies aligned with performance metrics
5. Develop and sustain mentoring/sponsorship initiatives to promote/retain a diverse workforce
6. Develop/sustain hiring practices to ensure a diverse workforce composition (e.g., every cultural nuance, education level, professional discipline, and level of practice)
7. Engage in community investment to decrease gaps in care for populations served
8. Partner with CBOs on shared funding opps to bridge treatment gaps for shared populations
9. Support and implement patient experience/mentor programs across patient populations
10. Use patient-reported outcome measures for all demographics (e.g., patient engagement, activation, motivation)

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PILLAR 2: 5 Cs FOR CASE MANAGEMENT

COMMUNICATION


<p>CLINICAL CAPACITY</p> <ul style="list-style-type: none"> • Affirm clients and involved caregivers are capable to engage in informed decision-making about care decisions and planning 	<p>COMPETENCY (A.K.A. LEGAL CAPACITY)</p> <ul style="list-style-type: none"> • Affirm clients and involved caregivers have the mental soundness to make decisions about a specific issue; a judicial finding made by the court vs. a medical or behavioral health professional 	<p>COPING</p> <ul style="list-style-type: none"> • Acknowledge and address the latent and manifest vulnerability of clients, caregivers, and involved parties going through the healthcare experience 	<p>CHOICE</p> <ul style="list-style-type: none"> • Provide clients, caregivers, and involved parties the choices about care, planning, and any decision-making opportunities
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MENTAL STATUS EXAM

1. Appearance, behavior, and attitude
2. Orientation (e.g., person, place, time, situation)
3. Memory (e.g., short term, long term)
4. Affect (e.g., flat, reflective of mood)
5. Mood (e.g., sad, happy)
6. Thought content or form, and concentration (e.g., hallucinations, delusions)
7. Self-harm (e.g., suicidal and/or homicidal ideation)
8. Characteristics of speech (e.g., rapid, flight of ideas, intelligibility)
9. General intellectual level (e.g., average for age)
10. Insight (e.g., understanding the problem, diagnosis)
11. Judgement (e.g., understand consequences of actions)



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COPING CONTINUUM

Verbal and non-verbal (behavioral) presentation of the person in response to a situation

- What do we see?
- What do we not take the time to see?
- What do clients or families not want us to see?

Unique to the client, caregiver, and their circumstance

- Consider cultural nuances: **ableism, ethnicity, gender, familial orientation, race, religious and spiritual beliefs, sexual orientation, socioeconomic status, or others**

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Coping Journey	Recommended Language
Introduction	<ul style="list-style-type: none"> • Hello, my name is _____, and I'm the case manager. Have you worked with a case manager before? • I focus on....
Temperature Check	<ul style="list-style-type: none"> • How are things going today? • You told me how upsetting it was the last time we talked. How is it today?
Express Empathy	<ul style="list-style-type: none"> • What questions do you have? How can I help? • Sit in silence with a client/family; let them to begin. • Use verbal/nonverbal gestures to convey understanding, acknowledgment.
Acknowledge Client Reality	<ul style="list-style-type: none"> • Lots is going on. I can't imagine what it feels like. Tell me, how is it for you today? • Other patients and families have shared how overwhelming the (diagnosis, decision-making, coping, adjusting) is. How can I make it easier for you? • I've worked with other clients and families in similar situations; everyone responds differently. What is it like for you?

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Be Genuine	Instead of saying, "I UNDERSTAND," consider: <ul style="list-style-type: none"> • How might I feel if this were my parent, spouse, partner, child, friend? • Am I in touch with my own personal feelings?
Affirm Understanding	<ul style="list-style-type: none"> • I want to make sure that I understand.... <ul style="list-style-type: none"> • What you are saying? • How you're feeling? • What further questions you have? • Here is what I heard you say, but tell me if I got that right.
Stay in the Moment	Avoid distractions, whether the communication is virtual, telephonic, or in person (e.g., other conversations, looking at digital devices or multiple screens)

(Fink-Sammick, 2023)

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CHOICE

Choice is a patient right

Choice heeds autonomy and empowers a CM's advocacy

- Provide clients, caregivers, and stakeholders all options and resources specific to their care
- **What does this mean to you and your organization?**
 - Do you provide a list of resources?
 - If so, who defines what's included?
 - How is shared decision-making engaged in?


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COMMUNICATION UNDERLIES EVERY CONSIDERATION

It's not only what we say but, how we say it and convey it!

- Start with Pillar 1
- Verbal vs. Non-verbal
- Context of the patient's reality
- Tone, pace, and flow of conversation
- *How do you understand the information I just shared with you?*



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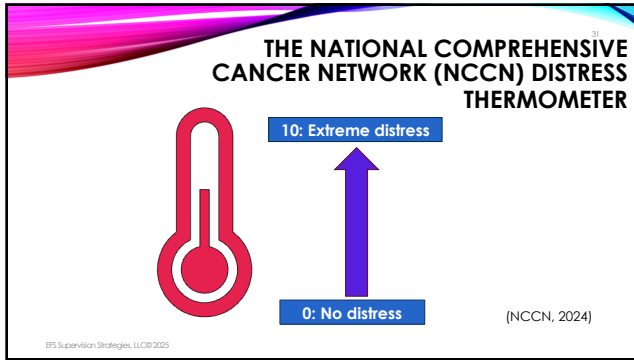
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PILLAR 3: MANAGE CAREGIVER AND WORKFORCE DISTRESS



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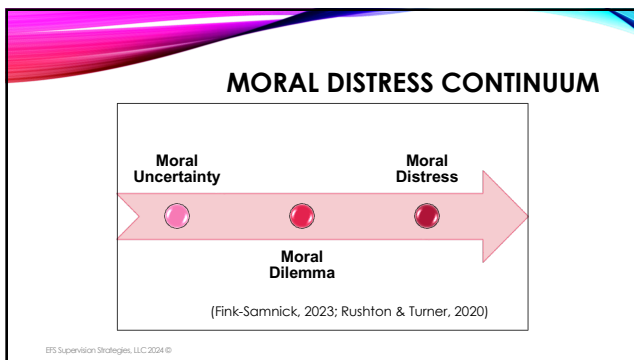
Problem List

Have you had concerns about any of the items below in the past week, including today? (Mark all that apply)

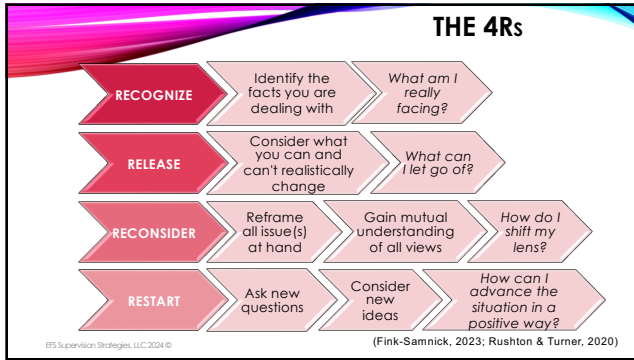
<p>Physical Concerns</p> <ul style="list-style-type: none"> <input type="checkbox"/> Pain <input type="checkbox"/> Sleep <input type="checkbox"/> Fatigue <input type="checkbox"/> Tobacco use <input type="checkbox"/> Substance use <input type="checkbox"/> Memory or concentration <input type="checkbox"/> Sexual health <input type="checkbox"/> Changes in eating <input type="checkbox"/> Loss or change of physical abilities <p>Emotional Concerns</p> <ul style="list-style-type: none"> <input type="checkbox"/> Worry or anxiety <input type="checkbox"/> Sadness or depression <input type="checkbox"/> Loss of interest or enjoyment <input type="checkbox"/> Grief or loss <input type="checkbox"/> Fear <input type="checkbox"/> Loneliness <input type="checkbox"/> Anger <input type="checkbox"/> Changes in appearance <input type="checkbox"/> Feelings of worthlessness or being a burden <p>Social Concerns</p> <ul style="list-style-type: none"> <input type="checkbox"/> Relationship with spouse or partner <input type="checkbox"/> Relationship with children <input type="checkbox"/> Relationship with family members <input type="checkbox"/> Relationship with friends or coworkers <input type="checkbox"/> Communication with health care team <input type="checkbox"/> Ability to have children <input type="checkbox"/> Prejudice or discrimination 	<p>Practical Concerns</p> <ul style="list-style-type: none"> <input type="checkbox"/> Taking care of myself <input type="checkbox"/> Taking care of others <input type="checkbox"/> Work <input type="checkbox"/> School <input type="checkbox"/> Housing <input type="checkbox"/> Finances <input type="checkbox"/> Insurance <input type="checkbox"/> Transportation <input type="checkbox"/> Child care <input type="checkbox"/> Having enough food <input type="checkbox"/> Access to medicine <input type="checkbox"/> Treatment decisions <p>Spiritual or Religious Concerns</p> <ul style="list-style-type: none"> <input type="checkbox"/> Sense of meaning or purpose <input type="checkbox"/> Change in faith or beliefs <input type="checkbox"/> Death, dying, or afterlife <input type="checkbox"/> Conflict between beliefs and cancer treatment <input type="checkbox"/> Relationship with the sacred <input type="checkbox"/> Ritual or dietary needs <p>Other Concerns</p> <hr/> <hr/> <hr/> <hr/>
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

(NCCN, 2024)

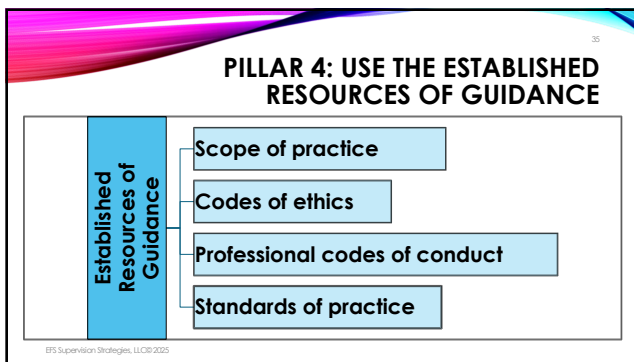
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Board-certified case managers will:

Principle 2: respect the rights and inherent dignity of all of their clients.

Principle 3: always maintain objectivity in their relationships with clients.

Principle 4: act with integrity and fidelity with clients and others.

Principle 7: Obey all laws and regulations

Board-Certified Disability Management Specialists shall

Principle 2: respect the integrity, dignity, and protect the welfare of those persons or groups with whom they are working.

Principle 3:.....ditto

Principle 4:.....in dealing with other professionals

RPC 1.08 – Objectivity


RPC 1.12 d: Misconduct

RPC 1.13 a: Human Relations


(2023) Commission for Case Manager Certification


(2023) Certified Disability Management Specialist

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Code of Ethics
Provision 1: The nurse practices with compassion and respect for the inherent dignity, worth, and unique attributes of every person.
 (2015)

Social Work's Core Values:


- service
- social justice
- dignity and worth of the person
- importance of human relationships
- integrity
- competence.

(2021)



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(2022)

Standard B. Professional Responsibilities

- The professional case manager should engage in scholarly activities such as contributing to curricula and maintaining familiarity with current knowledge, competencies, case management-related research, and evidence-supported care innovations.
- The professional case manager should also identify best practices in case management and health care service delivery and apply such in transforming practice, as appropriate.
- Finally, the professional case manager should provide the highest quality care by staying informed of the latest innovations and best practices in health care delivery.

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(2022)

Standard D. Ethics

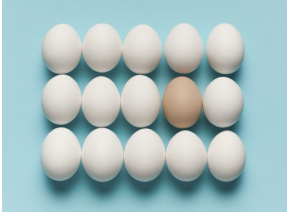
Recognition of obligations:

- First to clients cared for
- Second, to engage in and maintain cooperative and respectful relationships with employers, coworkers, and other professionals.
- Third, to maintain personal and occupational health, safety, and integrity and.....
- View clients as unique individuals whom CMs should engage without regard to disability, familial preference, gender identity, sexual orientation, race or ethnicity, national origin, migration, background, religion, socioeconomic status, geographic location, or other cultural considerations.
- Enact policies to ensure universal respect of the integrity and worth of each person
- The needs of society as a whole, by recognizing the complexities and impact on health and well-being that inequity and disparity, bias, exclusion, racism, and injustice caused, but address individually

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YOUR ULTIMATE CONSIDERATION



What have you done to make every involved stakeholder (e.g., patients, families, colleagues) feel:

- Safe,
- Seen,
- Heard, and
- Valued?

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RESOURCES 45

- Cecil B. Sheps Center/UNC: <https://www.shepscenter.unc.edu/programs-projects/ural-activity>
- Conversation Project/Institute for Healthcare Improvement: <https://theconversationproject.org>
- Data.CMS.gov:
 - Mapping Medicare Disparities: <https://data.cms.gov/tools/mapping-medicare-disparities-by-population>
- Health Equity Tracker: <https://thehealthequitytracker.org/>
- HHS Health Equity Action Plan: <https://www.hhs.gov/equity/index.html#eap>
- Latino Cancer Institute: <https://latinooncologyinstitute.org>
- National Cancer Institute:
 - Cancer Disparities: <https://www.cancer.gov/about-cancer/understanding/disparities>
- National Institute on Minority Health and Health Disparities:
 - Diversity and Inclusion in Clinical Trials <https://www.nlmhd.nih.gov/resources/understanding-health-disparities/diversity-and-inclusion-in-clinical-trials.html>
- POLST: <https://polst.org/>

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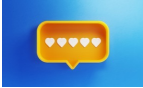

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Q & A 

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Thank you!

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