





Case Management Intervention Quick Guide

This guide provides intervention ideas for working with clients when they are not improving. This is a starting place; case managers and their teams are encouraged to add items as relevant. **Instructions:** Find the **Barrier** you think is most important to address. Then, identify an **Area of Focus**. Next, choose an **Intervention Idea** to try. Return to the list and try another intervention if one does not work or improvements are still needed.

Barriers	Area of Focus	Intervention Ideas
 Low Motivation	Client seems indifferent.	Engage client around values, preferences, and personal treatment goals.
	Client shows symptoms of active depression or psychosis.	Connect client with their psychiatric provider.
	Client might not understand their medical condition(s) or treatment plan.	Ask client to share what they know in their own words.
		Review educational materials with client.
 Ineffective Treatment Plan	Client is not successfully managing their medications, diet, or physical activity.	Assess client's health literacy; ask "can we look at this together?"
		Advocate to providers for a simpler plan, like once-daily meds.
		Let the team know the current treatment plan is not working.
		Create <i>Habit Cards</i> with client to support very small & very easy habits.
 Limited Resources	Client has limited finances.	Help client optimize their benefits: disability, Medicaid, etc.
	Client has limited or no transportation.	Connect client with bus pass, taxi voucher, schedules, etc.
	Cultural differences impacting a client's engagement in treatment.	Engage with the client's family & other supportive people.
		Recruit medical providers for support.
 Care System Breakdown	Primary care or medical systems are tricky to navigate or seem uncoordinated.	Use the <i>Case Manager Checklists</i> to support client interactions with providers; this might include attending appointments with your client.
		Ask medical providers how you can make the process easier.
	Medical information is not easily shared between primary care or medical systems and you or client.	Identify a contact from medical office to work with, e.g., nurse.
		Use an <i>Elevator Speech</i> to help medical staff understand your role, program & how you support your client's health.