

# NATIONAL ACADEMY OF CERTIFIED CARE MANAGERS

## Content Domains and Care Manager Tasks

*The Care Manager Certification examination questions contain content from the following domains. The approximate percentage of questions from each domain is also indicated.*

### ***Domain I. Assess and identify client strengths, needs, concerns, and preferences (21%)***

- 1) Screen a potential client in order to determine the appropriateness of and eligibility for service
- 2) Conduct a comprehensive assessment of the client
- 3) Conduct an assessment of the client using standardized instruments
- 4) Conduct an assessment of the client's informal and formal support system
- 5) Assess the client's ability to participate in developing the care plan
- 6) Collect additional data by contacting relevant sources (e.g. physician(s), social support systems, and other care providers) in order to validate and expand the information obtained
- 7) Synthesize and interpret the assessment data
- 8) Document all intake and assessment information

### ***Domain II. Establish goals and a plan of care (21%)***

- 1) Prioritize areas of concern in collaboration with client and support system in order to identify potential areas for intervention
- 2) Identify options and resources that address the areas identified for intervention
- 3) Discuss with the client the advantages, disadvantages, and costs of available/appropriate options and resources
- 4) Work with client/responsible party in order to establish mutually agreed upon goals
- 5) Develop action steps in order to achieve the agreed upon care plan goals
- 6) Develop a timeline for implementation
- 7) Document care plan

***Domain III. Implement care plan (19%)***

- 1) Coordinate services and interventions
- 2) Communicate to the client and the client's support system the goals of the care plan
- 3) Obtain consensus of the client and client support system for the care plan
- 4) Document action steps taken related to the provision of services and progress toward goals

***Domain IV. Manage and monitor the ongoing provision of and need for care (19%)***

- 1) Monitor service delivery and intervention(s)
- 2) Perform periodic reassessment of client status
- 3) Evaluate client satisfaction with services
- 4) Evaluate progress toward goal achievement
- 5) Determine need for and make adjustments to care plan
- 6) Document monitoring activities and client status
- 7) Develop a process for termination of services
- 8) Document reasons for service termination in client record

***Domain V. Ensure professional practice and supervision of care management (20%)***

- 1) Promote client autonomy and right to self-determination
- 2) Recognize and respect diversity with respect to factors such as culture, religion, ethnicity, gender, sexual orientation, and socioeconomic status, in order to uphold client's value system, preferences, and choices
- 3) Adhere to standards of practice and professional codes of ethics and strategies for identifying and resolving ethical dilemmas
- 4) Document and analyze business practices, risk management strategies and financial metrics to ensure they are consistent with the standards of practice and code of ethics of the profession and to ensure quality and effective services administration to clients
- 5) Participate in peer review and/or clinical supervision
- 6) Develop knowledge of the principles of effective supervision of care management services and perform ongoing monitoring of supervised staff to ensure accountability, success, and self-efficacy

*Content domains, care manager tasks, and percentages were reviewed, updated, and approved by the Board of Directors on September 7, 2016.*

## **KNOWLEDGE REQUIRED TO PERFORM CARE MANAGER TASKS**

### **Theoretical Bases**

- human development theory
- personality theory
- behavior theory
- systems theory
- family systems theory
- organizational behavior
- crisis theory
- adult learning theory
- change theory

### **Assessment**

- health issues for individuals with chronic health concerns or disabilities
- functioning as it relates to all activities of daily living including: transfer, walking, wheeling, bowel, bladder, toileting, mobility, bathing, dressing, eating, and feeding
- functioning as it relates to all instrumental activities of daily living including: medication, meal prep, shopping, housekeeping, laundry, telephone, travel, finances
- common emotional disorders and their symptoms
- techniques for administering and interpreting of structured cognitive screening tools (orientation, memory, and judgment), and behavioral, emotional, and life satisfaction assessment tools
- risk assessment techniques
- interviewing techniques
- techniques for collecting demographic, environmental, social system, and financial information
- basic nutritional and hydration needs as well as special requirements relating to individuals with chronic health concerns or disabilities
- common medications relating to individuals with chronic health concerns or disabilities
- impact of diversity in areas such as culture, religion, ethnicity, gender, sexual orientation, and socioeconomic status on behavior, perceptions and value systems that relate to health care
- substance abuse
- preferences, expectations, capabilities, limitations, stress, and coping mechanisms of the client and others and their impact on the client system
- the impact of interactions between the formal and informal support systems
- the impact of spirituality on health
- the impact of health status and functional abilities on behavior and emotions

- advanced directives such as power of attorney, living will, health care surrogate
- indicators that client is at risk for financial exploitation
- indicators that client is in need of guardian/conservator
- abuse, neglect, and exploitation issues
- grief and loss
- requirements of the Americans with Disabilities Act
- data analysis and interpretation
- legal and financial vehicles for financing care such as special needs trusts
- communicable diseases including MRSA, TB, HIV

### **Care Planning**

- care planning process
- how to write goals that are specific, measurable, agreed upon, realistic, and time limited
- reimbursement mechanisms such as health insurance, supplemental insurance, long-term care insurance
- entitlement programs such as Medicare and Medicaid, Veterans' Administration, SSD, SSI, and their eligibility requirements
- options for financing care such as reverse mortgages, equity loans, annuities
- budgeting and cost-benefit analysis
- social, environmental, and medical services available to enhance function such as durable medical equipment, respite, day treatment, home adaptation
- intervention strategies, such as medication management, treatment modalities, crisis intervention, psychosocial interventions
- housing options such as assisted living, continuing care retirement communities (CCRCs), intentional communities
- alternative/complementary services such as acupuncture and massage
- end of life planning
- hospice and palliative care

### **Coordination of Care**

- formal and informal provider responsibilities
- availability and use of interpreters and adaptive communication equipment
- appropriate record keeping and documentation
- referral procedures to service providers
- emotional, physical, geographical, financial, and/or cultural barriers to service delivery
- interdisciplinary team building and techniques to enhance inter-organizational relations

## **Professional Practice**

- legal and ethical issues of reporting abuse and neglect
- grievance procedures and complaints
- appeals processes (entitlement appeals, professional grievance procedures)
- applicable standards of practice and ethical guidelines
- HIPAA
- informed consent
- professional liability
- client advocacy procedures
- client empowerment strategies
- guardianship/conservatorship process
- client rights and responsibilities
- peer review processes
- record audit process
- community outreach and education techniques
- outcome measurement and quality assurance practices

## **Generic Competencies**

- decision making
- conflict resolution techniques
- group dynamics
- stress management techniques
- time management techniques
- organizational skills
- counseling techniques
- crisis intervention techniques
- teaching and coaching techniques
- motivational techniques
- negotiation and mediation strategies
- networking techniques
- problem solving techniques
- interpersonal relations
- prioritization
- communication techniques