



P O Box 201401
Denver, CO 80220
(303) 378-8140

Medical Case Management Certificate Program Scope of Work

The following Scope of Work outlines the Medical Case Management (MCM) Certificate Program consisting of eleven required web-based trainings (along with one optional course, *Motivational Interviewing for Supervisors*) and two full-day workshops. The certificate curriculum is based on best practices and research on MCM as well as input from AIDS Service Organizations, Ryan White Grantees, Boston College Department of Social Work and others in order to meet the new HRSA MCM definition requirements: Medical case management services *must be provided by trained professionals, including both medically credentialed and other health care staff.*

DMS presented the MCM Certificate Program at the 2011 National HIV and Social Work Conference to a diverse audience of MCMs, program supervisors and system administrators. DMS has been asked to present the Certificate Program at the HIV and Social Work Conference again in 2012. In 2011, the program has been delivered to the Denver Transitional Grant Area (TGA) and the Arizona Part B system. In addition, other national and local programs are scheduled or expected to be finalized for delivery in 2012.

DMS Qualifications and Expertise

DMS brings a wealth of HIV specific experience to the development of the MCM Certificate Program. Melinda Marasch, LCSW and Matthew Bennett, MA, MBA will facilitate the Program with developmental support from Bettina Harmon, MDiv. Combined, the DMS team brings decades of experience working with both the clinical and programmatic aspects of Ryan White Programming. This experience includes:

- 7 Years working with the Denver TGA Grantee
 - Training Series
 - 43 in person trainings overall (including MCM Certificate Program in FY 2011)
 - Web-based Training Series
 - Quality Management
 - MCM Research Project (diversemanagementsolutions.com/dohr_case_management_assessment.pdf)
 - Web-based resource inventory (findhivresources.com)
 - Site Visits and Quality Assurance Programming (FYs 2007-2011)
- 5 Years working with Denver HIV Resources Planning Council
 - Standards of Care
 - Web-based New Member Orientation Training (dhrpc.org)
 - 2009 Comprehensive Plan
 - Needs Assessments

- Organizational Documents (Bylaws, Conflict of Interest, Confidentiality, New Member Orientation)
- 3 Years working with Colorado Part B Grantee
 - Training Series (In Person and Web-based)
 - Quality Management Plan
 - Data Management
- Other HIV Specific Experience:
 - More than 25 combined years working in AIDS Service Organizations (ASOs)
 - Training, Consulting and Clinical Supervision:
 - Part A ASOs in Denver and Pennsylvania
 - Part B ASOs in Colorado, Nebraska and Arizona
 - Part D ASOs in Denver and Pennsylvania
 - HIV related Conference Presentations and Pre-Conferences:
 - Ryan White All Parts Conference (2006, 2008, 2010)
 - National HIV and Social Work Conference (2010, 2011)
 - National Healthcare for the Homeless Conference (2011)
 - AIDS Coalition for Education Conference (2010)

MCM Certificate Program Description:

The goal of the MCM Certificate Program is to provide learners a strong knowledge base and clinical skill set necessary to succeed with the diverse set of client needs inherent to the work of a MCM. To accomplish this, DMS implements a combination of web-based and in person workshops tested with case managers in both urban and rural settings. DMS will manage the web-based training through a learning management system that allows user progress reports. Learners will be asked to complete the web-based portion of the program before attending the in person workshops.

Web-Based Trainings:

(Please note that the workshops are presented in order of recommended completion.)

1. Helper as a Person in HIV: Sometimes it is difficult being human in human services. This workshop gives the learner basics self-care skills in MCM. At the end of the workshop learners will be able to: (1) Define appropriate professional boundaries; (2) Identify Transference and Counter Transference; (3) Identify the dynamics of burn-out; (4) Understand the serious health dangers of burn-out; (5) Define vicarious trauma, secondary trauma, and compassion fatigue; and (6) Understand how to maximize wellness in the helping field.
2. Therapeutic Communication in HIV: This workshop enhances the MCM's ability to communicate with clients who have HIV/AIDS. At the end of the workshop learner will be able to: (1) Identify the basic elements of therapeutic communication; (2) Identify the obstacles to effective communication; (3) Increase knowledge about the fundamental skills for therapeutic communication; and (4) Learn new communication techniques to utilize immediately.



3. Multiculturalism in HIV: Working with people diagnosed with HIV/AIDS means working with a very diverse group of clients. At the end of the workshop learners will be able to: (1) Define key terms, such as culture, ethnicity, race and cultural competence; (2) Understand what it means to be a culturally competent helper; (3) Describe the impact of culture on personal development; and (4) Utilize new approaches to cultural competence in work with clients.
4. Approaches to Difficult Situations in HIV: MCMs deal with many challenging situations including client struggles with mental health and substance abuse. This workshop teaches the learner how to deal effectively with difficult situations involving clients with HIV/AIDS. At the end of the workshop learners will be able to: (1) Identify the facts about escalation; (2) Manage the verbal escalation continuum; and (3) Identify therapeutic strategies in dealing with difficult situations.
5. HIV 101: The better MCMs understand HIV, the better they can support and educate clients. Research shows that client understanding of HIV increases adherence and health outcomes. At the end of the workshop learners will be able to: (1) Explain the life cycle of HIV; (2) Identify HIV transmission and risk factors; (3) Identify the dynamics and limitations of HIV testing; (4) Identify different labs; (5) Explain the basics of HIV treatment; and (6) Explain the basics of HIV medication and side effects.
6. HIPAA in HIV: As a helping professional, it is essential that MCMs understand confidentiality and HIPAA. At the end of the workshop learners will be able to: (1) Identify the key components of HIPAA; (2) Define what HIPAA does; (3) Understand the guidelines for releasing protected health information; and (4) Understand the guidelines for technology.
7. Mandatory Reporting in HIV: Learn about Mandatory Reporting and other requirements as a helper working in the HIV/AIDS field. At the end of the workshop learners will be able to: (1) Define Informed Consent; (2) Identify the elements of Duty to Warn; (3) Understand Mandatory Reporting; and (4) Understand reporting as it relates to At-Risk Adults.
8. Service Planning and Monitoring in HIV: Learn how to effectively and efficiently utilize service plans and monitor client progress. Critical to funding and service delivery, this training examines best practices in utilizing paperwork to improve client outcomes. At the end of the workshop learners will be able to: (1) Identify the service planning cycle; (2) Name the reasons for service planning; (3) Write measurable objectives; and (4) Write a service plan for re-engagement in care.
9. Stages of Change in HIV: Learn about the stages of change and how to utilize them with clients diagnosed with HIV/AIDS. At the end of the workshop learners will be able to: (1) Identify key attributes of clients in each stage of change; and (2) Describe the Helper's tasks in working with clients in each stage of change.
10. Harm Reduction in HIV: Learn how to apply harm reduction approaches to client-centered care with those diagnosed with HIV/AIDS. At the end of the workshop learners will be able to: (1) Apply Harm Reduction theory; (2) Identify key tenets of Harm Reduction; and (3) Recognize Harm Reduction approaches to client-centered care.



11. Motivational Interviewing (MI): Introduces the theory and skills in applying MI approaches. The training offers specific MI approaches (e.g. FRAMES) and strategies for maximizing client outcomes. Specifically, this workshop seeks to enhance skills and confidence in assessing, engaging, and supporting clients toward positive life changes. At the end of the workshop learners will be able to: (1) Define Motivational Interviewing (MI); (2) Identify the 4 fundamental principles of MI; (3) Identify “The Fundamental” helping skills; (4) Understand tools to assess readiness for change; (5) Assess where to start with the many goals participants present; and (6) Understand methods to evoke change. talk.
12. Motivational Interviewing for Supervisors (*Optional for Supervisors or other interested parties*): This workshop is intended to enhance the knowledge, skills and confidence in applying MI approaches as a Supervisor. *MI for Supervisors* builds off the *MI Web-based Training* and incorporates management theory to enhance the ability of Supervisors to support workers in implementing MI approaches, and to provide key skills in managing workers. At the end of this workshop learners will be able to: (1) Increase understanding of MI approaches; (2) Enhance ability to support MCMs in applying MI approaches; (3) Understand the use of MI approaches in the supervision/management of employees.

In Person Training:

- Day 1
 - Best Practices in MCM: A brief overview of a nation-wide study of medical case management both in HIV and in other chronic diseases. At the end of the section learners will be able to: (1) Identify best practices in MCM; (2) Understand the role of MCMs in increasing health outcomes; and (3) Understand the role of MCMs in decreasing health costs.
 - Positioning Clients to Succeed: This section will set the foundation for the therapeutic aspects of the MCM Certificate Program, giving the learner the knowledge to conceptualize clients and how to position them for success. At the end of the section learners will be able to: (1) Identify reasons the impact of trauma and stress; (2) Recall aspects of neurobiological research on change; and (3) Utilize Stages of Change to assess how clients are positioned for change.
 - Motivational Interviewing: Building upon the conceptualization and assessment skills learned in the previous section, this section provides a review of MI theory with a significant amount of skills practice to build confidence and abilities. At the end of the section learners will be able to: (1) Better understand MI theory; (2) Explain the 4 fundamental principles of MI; and (3) Willing to implement at least 1 MI approach with clients.
- Day 2
 - Medical Self Management: Client self management of their medical condition is the goal of most MCM programs. In this section, learners will learn strategies associated with health literacy and adherence. These strategies and approaches will connect best practices with MI skills learned in Day 1. At the end of the section learners will be able to: (1)



- Understand the connection between medical self management and change; (2) Better understand how to enhance health literacy; and (3) Utilize MI techniques to discuss adherence with clients.
- **Thrive: Being the best MCM Possible:** The final section of the training will focus to the MCM as a professional and a person. One often overlooked skill is the ability to stay healthy and effective in an extremely stressful job where burnout and secondary trauma are real threats, and can negatively impact the very people we are serving. This section will give the learners strategies to keep themselves healthy and increase their overall performance. At the end of the section learners will be able to: (1) Define robustness; (2) Identify the impact of stress, trauma or burnout on the helper; and (3) Implement self care strategies to enhance robustness or resiliency.

Fee Schedule

The cost of the MCM Certificate Program (including web-based and in person trainings) is listed below. This includes (1) access to the web-based trainings for the learners through the date of the in person training; (2) management of the Learning Management System (LMS), (3) learner progress reports from the LMS; and (4) preparation and delivery of two days of in person training.

Item	Cost:
2 Days of In Person Training and Facilitation (2 facilitators)	\$3,700
Access to the 12 web-based trainings	\$175 per learner

References:

Vincent J. Lynch, MSW, Ph.D.
Conference Founder and Chair
Boston College
Graduate School of Social Work
140 Commonwealth Avenue
McGuinn Hall #125
Chestnut Hill, MA 02467
617-552-4038
lynchv@bc.edu

Maria Lopez
Program Manager
Denver HIV Resources Planning Council
200 W. 14th Avenue, Suite 210
Denver, CO 80204
720-865-5503
marial@dhRPC.org

Lynn Hough
Program Manager
Denver Office of HIV Resources
200 W. 14th Ave, Suite 210
Suite 210
Denver, CO 80202
720-865-5421
Lynn.Hough@denvergov.org

