

STEPS

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How to Choose a Case Manager



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Contents

How to Choose a Case Manager - 4

Guide Collaborators - 4

What is a Case Manager? - 5

The Responsibilities of Case Manager - 6

What are the typical tasks and duties that case managers handle in various cases? - 6

An overview of the general role and responsibilities of a case manager - 6

Importance of Case Manager Expertise - 7

Does the expertise of a case manager significantly impact the outcome and rehabilitation process for individuals facing diverse challenges? - 7

In what ways does the specialised knowledge of a case manager benefit individuals dealing with serious injuries? - 7

Immediate Needs Assessment (INA) - 8

What does an Immediate Needs Assessment involve and how does it contribute to the overall management of cases? - 8

What specific aspects of a situation would be addressed during the Immediate Needs Assessment? - 9

The 2015 Rehabilitation Code - 10

Involvement in Choosing a Case Manager - 11

To what extent will individuals be involved in the selection process of their case manager? - 11

Can individuals provide input or preferences regarding the qualifications or characteristic of the case manager assigned to them? - 11

A Local or Non-Local Case Manager - 11

Is it generally more beneficial for a case manager to be local, or is geographical proximity not a significant factor in the effectiveness of their support? - 11

How does the location of the case manager typically impact the services they can provide to individuals facing diverse challenges? - 11

Meetings with Case Managers – 12

How often should individuals expect to meet with their case manager, and what is the purpose of these meetings? – 12

Can the frequency of meetings be adjusted based on changing needs or circumstances? – 12

Relationship with your Case Manager – 13

What steps can be take if there is difficulty or disagreement in the working relationship with the assigned case manager? – 13

Are there mechanisms in place to address and resolve any potential conflicts or communication challenges that may arise in such situations? – 13

The Role of Case Managers in Case Settlement – 13

How do case managers generally contribute to the overall resolution of cases? – 13

In what ways can a case manager support and facilitate the resolution of legal and financial aspects related to different solutions? – 13

Duration of Case Manager Support – 14

What is the typical expected duration of having a case manager assigned to individuals facing diverse challenges? – 14

Glossary – 15

The information shared in this document should only be used as a guide. If you require support, please email:

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How to Choose a Case Manager

Following a catastrophic injury, individuals, their loved ones, and caregivers are often faced with a number of complex decisions. Among these important choices is the selection and instruction of a case manager—an essential figure in the recovery journey, who will help with coordinating comprehensive care and rehabilitation.

We have closely collaborated with some case managers who specialise in catastrophic injuries to gain insights into their roles, responsibilities, and the key factors to consider when selecting and instructing a case manager.

Thank you to the following case managers:

- Michelle Bunyan
- Sarah Hinsley
- Jason Chidwick
- Jackie Chappel

Their expertise and collaboration have helped us in the development of this guide.

Guide Collaborators



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Spinal Injury

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Case Manager and Registered Nurse at Integrated Case Management



Jason Chidwick
Amputee Clinical Lead / Specialist Rehabilitation Case Manager



Jackie Chappel
Catastrophic Injuries

Director, Case Manager and Occupational Therapist at Positive OTCM

All case managers should be registered with either BABICM (British Association of Brain Injury and Complex Case Management) and / or CMSUK (Case Management Society).

Both of these membership organisations work to provide continued professional advancement frameworks, representation of case managers, and promote best practice within case management.

More information about both organisations can be viewed by click their logos below:



With support from both organisations, the IRCM (Institute of Registered Case Managers) is working to provide accreditation for case managers.

More information can be found by clicking the logo below:



What is a Case Manager?

Case managers play a pivotal role in overseeing, coordinating, and managing comprehensive care and rehabilitation plans for their clients, matching them to the right resources and services.

Instructed after a personal injury or medical negligence claim which has resulted in serious injuries such as brain injury, spinal cord injury or amputation, case managers offer expert guidance.

Their focus is to identify and coordinate the most suitable resources and services to address the specific needs of the client.



The Responsibilities of Case Managers

What are the typical tasks and duties that case managers handle in various cases?

Case managers play a crucial role in liaising between NHS and private clinicians, ensuring clarity regarding the treatment being provided to the client and ensuring that it aligns with the client's individual short- and long-term goals. They also engage with the client and their family to ensure they are happy with the interventions and fully understand the rehabilitation process, whilst also keeping legal teams and insurers informed.

Case managers can also suggest various forms of therapy or equipment that might be necessary, if they are available through the NHS or through private providers. Accessing them within a reasonable timeframe is crucial for the client's rehabilitation.

The daily responsibilities of a case manager are diverse and can include report writing, speaking to clients, legal teams, and clinicians, sourcing equipment, accompanying clients to view properties or vehicles, attending medical appointments, or chairing multidisciplinary (MDT) meetings.

No two days are the same, but the overarching objective remains the same, to fulfil the client's clinical needs and progress towards their rehabilitation goals.

An overview of the general role and responsibilities of a case manager

The general role and responsibilities of a case manager encompass a wide array of tasks aimed at supporting the client's overall well-being and rehabilitation journey.

This includes identifying client needs and sourcing appropriate local services, conducting regular reviews and providing feedback on progress, coordinating multidisciplinary team meetings involving professionals such as physiotherapists, occupational therapists, psychologists, and dieticians.

Additionally, case managers liaise with legal teams to make recommendations, secure

funding, and handle financial matters. They also provide:

support in education or employment endeavours, address childcare, family, or animal-related issues, arrange care provision from social services, NHS, or private providers, assist in finding suitable accommodation with necessary adaptations, work closely with discharge and medical teams, aid in understanding ongoing medical needs including fertility concerns, organise equipment demonstrations and purchases, and ensure safeguarding measures are in place to protect the client's well-being.

“

The case manager is in effect the glue that holds everyone together in the rehabilitation process, providing a comprehensive overview of the client's progress and needs without much prompting.

”

Jason Chidwick

Importance of Case Manager Expertise

Does the expertise of a case manager significantly impact the outcome and rehabilitation process for individuals facing diverse challenges?

It's crucial to recognise that not all case managers are equipped to handle the complexities of catastrophic injuries. Specialisation matters. Case managers who exclusively work with catastrophic injury clients bring a depth of knowledge and understanding that is essential for navigating the unique challenges and complexities associated with such cases. This expertise allows these case managers to think outside the box.

Dealing with catastrophic injuries goes beyond just managing physical trauma. It encompasses a wide range of emotional, social, and practical considerations. An experienced case manager will understand that their involvement is required in areas such as family dynamics and safeguarding.

Experience is the cornerstone of effective case management. A case manager with a minimum of five years of experience in a specific field will have a wealth of knowledge. This experience enables them to anticipate potential problems, advocate for their clients, and provide invaluable guidance.

An experienced case manager will also have established working relationships with legal teams and insurers which can be hugely beneficial in the rehabilitation process.

In what ways does the specialised knowledge of a case manager benefit individuals dealing with serious injuries?

Case managers with expertise in serious injury cases will instil confidence in clients by ensuring that the recommendations made are the right ones and will aid greater engagement in the rehabilitation process.

“

Experienced case managers understand the components of an effective multidisciplinary team, enabling them to orchestrate a cohesive approach that optimises rehabilitation outcomes and enhances quality of life.

”

Jackie Chappel

Immediate Needs Assessment

What does an Immediate Needs Assessment involve and how does it contribute to the overall management of cases?

An Immediate Needs Assessment (INA) is an evaluation conducted by a case manager following the personal injury or medical negligence claim. Its primary objective is to identify immediate needs and challenges faced by the client.

During the INA, the case manager carefully examines various aspects of the individual's situation, such as housing, employment, family dynamics and medical needs. Rather than recommending long-term solutions, as these will be addressed by experts during the claim's process, the focus is on recognising acute issues and creating a roadmap for support.

There are 10 key markers that should be taken into account during the preparation, remit, and outcome of the report:

- Age
- Pre-existing physical and psycho-social comorbidities
- Return-to-work/ education issues
- Dependents living at home
- Geographic Location
- Mental Capacity
- Activities of daily living in the short and long-term
- Realistic goals, aspirations, attainments
- Fatalities/ those who witness major incidence of trauma within the same accident
- Length of time post-accident

The INA report serves as a comprehensive overview of the individual's current circumstances and outlines actionable steps to address immediate needs, while also highlighting potential future challenges that may arise. If urgent issues are identified during the assessment, such as concerns related to safeguarding, safety, or wound management, bowel or bladder issues, immediate action is taken, including notifying legal representatives if necessary.

What specific aspects of a situation would be addressed during the Immediate Needs Assessment?

The Immediate Needs Assessment (INA) offers a comprehensive evaluation of the individual's circumstances, encompassing various crucial aspects:

- **Employment:** Assessing the individual's capacity to work effectively
- **Housing:** Evaluating the suitability of current living arrangements and identifying necessary modifications or accommodations to ensure a safe and accessible environment
- **Family Dynamics:** Recognising the injury's impact on family dynamics and relationships
- **Medical Needs:** Addressing immediate medical requirements, including wound management, pain control, medication management, and referrals to specialists for ongoing care
- **Additional Injuries:** Identifying any overlooked injuries or health concerns, with special attention to common issues such as bowel and bladder function, which significantly affect quality of life.



The Rehabilitation Code 2015

The 2015 Rehabilitation Code is a voluntary framework for claimants and defendants, that enables them to work together to ensure you receive the best and quickest possible medical, social and psychological recovery.

It strongly promotes the use of rehabilitation between the two parties at an early stage following an injury claim. This ensures your recovery is prioritised.

Through the framework of the code, your needs are assessed and addressed as a priority, through a collaborative basis.

To find out more about the code, please use the link below:

[The 2015 Rehabilitation Code](#)

Involvement in Choosing a Case Manager

To what extent will individuals be involved in the selection process of their case manager?

The involvement of individuals in selecting their case manager can vary depending on various factors. Typically, the process begins with the instruction of a case manager by a solicitor. In some instances, individuals may be introduced to their case manager through a financial planner.

A crucial part of the process is the initial meet and greet between the case manager and the client. Honesty is paramount during this

interaction, as it lays the foundation for effective communication and collaboration moving forward. While some solicitors may select a case manager based on expertise alone without a meet and greet, others prioritise matching the case manager's skills with the individual's needs and preferences.

During the meet and greet, it's common for the client or their loved ones, such as a parent or caregiver, to be present.

Can individuals provide input or preferences regarding the qualifications or characteristics of the case manager assigned to them?

Some clients trust their solicitors to choose the most suitable case manager based on their past experiences and the nature of the case.

Preferences regarding the gender of the case manager vary among clients; while some prefer a case manager of the same sex, others do not have a preference. In certain instances, speaking to someone of the same gender may feel more comfortable, particularly depending on the nature of the injuries. Additionally, some clients appreciate having a case manager who shares similar interests to them, such as sports.

A Local or Non-Local Case Manager

Is it generally more beneficial for a case manager to be local, or is geographical proximity not a significant factor in the effectiveness of their support?

Location certainly factors into the decision-making process when selecting a case manager, particularly concerning local knowledge of statutory services and private providers. However, while local knowledge is advantageous, it may not always be the primary consideration. For instance, prioritising a specialist case manager with extensive expertise, even if they live further away, may be preferable to a local case manager lacking the specific knowledge required by the client.

How does the location of the case manager typically impact the services they can provide to individuals facing diverse challenges?

What matters most is the case manager's ability to conduct regular visits. Their access to necessary services should remain unaffected as long as they are knowledgeable about what is available and how to access it.

Meetings with Case Managers

How often should individuals expect to meet with their case manager, and what is the purpose of these meetings?

Individuals should expect to meet with their case manager at least once every month, particularly when services are being established. These meetings serve the purpose of reviewing the client's progress and ensuring that their needs are adequately met by the services recommended by the case manager. Additionally, these meetings provide an opportunity to make timely adjustments if necessary, ensuring that the client receives the most effective support and intervention.

Can the frequency of meetings be adjusted based on changing needs or circumstances?

The frequency of meetings can indeed be adjusted to accommodate changing needs or circumstances. There's no one-size-fits-all approach; it's tailored to your individual requirements.

Initially, when there's a lot to address, meetings might occur more frequently, possibly even more than once a week. However, as things settle, the frequency typically decreases. A case manager will conduct regular reviews and reassess the goals set, usually on a 1-2 monthly basis. If you require more visits, your case manager will be flexible and adjust accordingly.

“

If your case manager manages funds for you, you might have more frequent contact. Additionally, there will likely be calls and emails exchanged between visits to ensure ongoing support and communication.

”

Michelle Bunyan

Relationship with Your Case Manager

What steps can be take if there is difficulty or disagreement in the working relationship with the assigned case manager?

In the first instance, speak to your case manager. If this is not possible, speak to your legal team. They will be able to either negotiate with the case manager or assist you to source a new one.

Are there mechanisms in place to address and resolve any potential conflicts or communication challenges that may arise in such situations?

In situations where conflicts or communication challenges arise, there are mechanisms in place to address and resolve these issues. One option is to revisit the instructing party, who can act as a mediator and facilitate discussions to find common ground. Additionally, proactive measures can be implemented to improve the management of the case and enhance client satisfaction.

For example, establishing regular weekly calls between the client and the case manager can provide opportunities to address concerns and share updates. Increasing the frequency of face-to-face meetings may also be beneficial.

The Role of Case Managers in Case Settlement

How do case managers generally contribute to the overall resolution of cases?

Case managers play a pivotal role in facilitating the resolution of cases by providing essential information and recommendations to legal teams. Their insights offer a comprehensive understanding of your needs, aiding in the decision-making process.

Importantly, case managers prioritise your well-being above the legal proceedings, ensuring that recommendations, such as selecting the most suitable equipment regardless of cost, are in your best interest.

In what ways can a case manager support and facilitate the resolution of legal and financial aspects related to different solutions?

Case managers play a crucial role in supporting and facilitating the resolution of legal and financial aspects in various situations. They often assess and quantify the costs associated with their recommended interventions, providing valuable insight into the financial implications.

This cost analysis serves as evidence that can inform expert opinions and future needs assessments. A comprehensive picture of the resources required, can help decision-making for both present and future needs.

Duration of Case Manager Support

What is the typical expected duration of having a case manager assigned to individuals facing diverse challenges?

It is difficult to state the expected duration of case management due to the nature of an injury, however for those with lifelong care and support needs following a catastrophic injury, they may have a case manager for the duration of their life. Other clients may only require support throughout their recovery period and may choose not to continue with assistance post-settlement.

Sometimes, there may also be extenuating circumstances in which involvement will need to be changed. This should be discussed with you, your legal team, and your case manager.

“

My clients always know that my support extends beyond traditional office hours, and I'm always responsive to their needs. If a client requires emergency assistance or simply needs to discuss concerns, they can reach out know that I'm here to help.

”

Sarah Hinsley

Glossary

1. **Accreditation:** Official recognition of someone as having a particular status or being qualified to perform a particular activity.
2. **Claimant:** The person making a legal claim for compensation.
3. **Client:** The individual receiving support from the case manager.
4. **Client Satisfaction:** Ensuring clients are content with services.
5. **Comprehensive Care:** All-encompassing support for injury recovery.
6. **Coordination:** Organising various aspects of care seamlessly.
7. **Defendant:** The person or entity against whom a legal claim is made.
8. **Dietician:** Specialists offering nutritional guidance during recovery.
9. **Equipment:** Devices aiding daily life post-injury.
10. **Evidence:** Factual information supporting claims or decisions.
11. **Expertise:** Specialised knowledge and proficiency
12. **Extenuating Circumstances:** Special factors influencing a situation.
13. **Financial Implications:** Effects on finances.
14. **Insurance:** Financial coverage for accident or injury-related expenses.
15. **Intervention:** Action to improve medical outcomes.
16. **Legal Team:** Solicitors assisting with legal matters related to the injury.
17. **Local Services:** Support available within the community.
18. **Multidisciplinary Team (MDT):** A collaborative group of professionals supporting injured individuals.
19. **Occupational Therapist:** Experts helping individuals with daily activities post-injury.
20. **Physiotherapist:** Professionals aiding physical recovery through exercises and movements.
21. **Psychologist:** Professionals providing emotional support after an injury.
22. **Rehabilitation:** Assisting injured individuals in recovery and regaining functionality.
23. **Representation:** Advocating for the interests of individuals.
24. **Resolution:** Addressing and solving problems
25. **Safeguarding:** Ensuring the safety and protection of injured individuals.

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