



POSITION STATEMENT

Case Management: The Occupational and Environmental Health Nurse Role

INTRODUCTION

Case management is a process of coordinating comprehensive healthcare services, following illness or injury, to deliver optimal quality care in a cost-effective manner. The process integrates assessment, planning, implementation, and evaluation components. Occupational and environmental health nurses (OHNs) as case managers provide all or a portion of these services in addition to coordination of care across the continuum, specifically for workers (American Association of Occupational Health Nurses [AAOHN], n.d.; Case Management Society of America [CMSA], 2016; Mullahy & Jensen, 2010).

Based on the complexities of healthcare and business environments, case management services must be delivered by qualified healthcare professionals with sufficient knowledge and expertise to perform this function competently and ethically (CMSA).

OHNs are the ideal professionals to coordinate services for workers with both occupational and non-occupational conditions, as well as dependents covered by the company's benefit plan, facilitating safe and timely return-to-work at the highest level of functioning achievable. To assist workers to achieve optimal health outcomes, OHNs use their critical thinking skills, expertise in healthcare delivery, knowledge of diverse service options, experience implementing return-to-work policies, and critical understanding of the interface between workers and their work environment.

RATIONALE

Since the late 1800's OHNs have delivered primary

care, managed occupational and non-occupational illnesses and injuries, and implemented and evaluated numerous programs to benefit workers and their families. Skyrocketing healthcare and workers' compensation benefit costs have forced employers to focus on cost containment strategies while maintaining quality of care. One such strategy, the utilization of nurse case management, has proven valuable to the employer and insurers with return on investment (ROI) reported as high as 2:1 to 3:1 (Mullahy & Jensen; CMSA, 2011).

Effective occupational and environmental health and safety programs address overall healthcare, disability, and workers' compensation costs. These programs:

- focus on primary, secondary, and tertiary prevention, and health promotion strategies to minimize accidents and illnesses,
- provide quality health care by knowledgeable and experienced occupational and environmental health professionals,
- incorporate case management strategies,
- facilitate effective communication between employers and injured or ill workers, and
- ensure workers are more knowledgeable, responsible, and confident consumers of health care services.

OHNs balance cost containment recommendations with the provision of high-level quality care making them ideal case managers. OHNs are well known employee and employer advocates to ensure:

- the workers' needs are met, and desired outcomes achieved,
- legal and regulatory compliance, as well as utilization of cost containment strategies, and
- workers and employers successfully navigate the complex healthcare system and take advantage of the various quality service options available.

The utilization of OHN's as well as case management practices and strategies amidst the global novel 2019 coronavirus (COVID-19) pandemic have proven integral to supporting and managing the needs of patients, workers, their employers, and the greater community, particularly during a crisis (Tahan, 2020). This crisis served as a catalyst for innovation, partnerships, and delivery of care and services beyond the traditional modes of care delivery (e.g., virtual or remote care delivery, and tele-monitoring), highlighting new opportunities for case management in the virtual world, among diverse contexts of healthcare organizations.

The complexities associated with case management and the responsibilities inherent to the role require healthcare professionals in the role of case manager to be well prepared, with a high level of knowledge and competency (Mullahy, 2017). Case managers must possess broad clinical knowledge (e.g., standards of care, occupational and environmental health and safety, return-to-work policies, healthcare delivery and payor systems, legal and regulatory policy), expertise (e.g., autonomy, advocacy, ethical practice), and skills (e.g., critical thinking, care coordination, clinical competency, use of research-based guidelines). To demonstrate the level of proficiency and expertise required of Case Managers as advanced clinicians, the professional organization developed the [Certified Case Manager \(CCM\) credential](#) (American Board for Occupational Health Nurses, 2021). Interested OHNs may review the [Case Management Candidate Handbook](#) to learn more about certification, and the [CMSA \(2016\) Standards of Practice for Case Management](#) to learn more about the expanding role of the professional case manager and the practice guidelines within the specialty.

CONCLUSION

OHNs have a long history of demonstrating their utility as clinicians and continue to support workers, their families, and their employers through various workplace healthcare delivery systems. As case managers they blend their advanced clinical expertise, critical understanding of workers and their environments, and the knowledge about complex

healthcare systems with established guidelines to ensure that optimal health outcomes are achieved in a cost-effective manner.

Effective case management is one strategy for employers to quantify their health care costs, demonstrate savings, and ensure the coordination and delivery of comprehensive quality healthcare services through all phases of illness or injury. The OHN, acting as case manager and coordinator, is the key to ensure quality healthcare delivery in a cost-effective manner, while supporting the greater community.

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