



Collaborative Case Management

A new collaborative process between Alberta Health Services Home Living and Senior Serving Outreach Workers.



Learn more about seniors living in the community.

- Alberta Health Services (AHS) Home Living &
 - Senior Serving Community-Based Outreach Services
- ... A new way of working together.

Improved **referral and collaboration** process:
Collaborative Case Management (2016).





Two sets of professionals work with seniors in their homes

Home Living Case Managers

Working for Alberta Health Services (AHS) Edmonton Zone Home Living.

Seniors Serving Outreach Workers

Working for Community-Based, Senior-Serving Outreach Services





**Communication
during shared
Case Management
between these two
groups has not
been ideal.**



Overcoming barriers to collaboration

Barriers to Collaboration:

- #1 Lack of awareness/knowledge of each other.

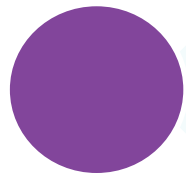
Opportunity:

- Clarified roles
- Increased awareness
- Simplified access
- Built relationships

A study was proposed and completed in 3 phases.



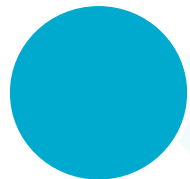
Project Phase 1: Review of Current Practice



Identified and defined current roles and responsibilities of Case Managers and Outreach Workers working with seniors in the community.



Understood current referral & collaboration processes – what worked and where gaps were.



Identified opportunities and strategies for collaboration and referral.



Current Roles and Responsibilities

Similarities

Both:

- Provide supports to help seniors stay in own homes
- Home visits
- Assessments
- Information, referrals, service recommendations

Differences

- **Case Managers:** focus on health care; short term service; promote independence
- **Outreach Workers:** focus on social determinants; ongoing support; advocate, accompany, build relationships



Project Phase 2: Developed a Standardized Process

Shared
Clients

Developed a
**standardized
process** for
collaboration and
referrals between
agencies.



Referral Rationale

Why Home Care Case Managers refer to Outreach

1. Client isolated, lacks supports.
2. Housing issues.
3. Client needs long-term/ongoing support.

Why Outreach Workers refer to Home Care Case Managers

1. Client has specific health care needs, declining health, sudden change.
2. Client needs additional Home Living supports.





Project Phase 3: Implemented and Evaluated

Test

Implemented, evaluated and revised proposed process among a small **sample** of case managers and outreach workers

Sustain

Established mechanisms for **implementation & sustainability** of process improvement.



New Home Living Tools

1. Home Living Case Manager **Decision Tree**
2. **Quick Reference:** [Seniors Outreach/Support Workers](#)
3. **Quick Reference:** [Home Living Case Managers](#)
4. **Client Information Sheet**
5. Collaborative Case Management **Contact Sheet**

Visit: www.seniorsnetworkcovenant.ca



To View or Download Collaborative Case Management Final Report



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Goals Achieved.

1. Home Living Case Managers and Outreach Workers **know when to refer to each other.**
2. Service gaps and **duplication reduced.**



3. Home Living Case Managers spend less time on **client needs best met in the community.**
4. Seniors served by both professional groups have **greater confidence and comfort** living in the community.



Seniors living in the community are better served.

New tools clarify roles and processes.



The Collaborative Case Management practice support process is now in place (Edmonton and area since 2016).



Conclusion

Collaboration between AHS Home Living and all Community-Based Outreach Services.



Integrated and interconnected supports for seniors with complex health and social needs.