Standards of Practice for Case Management

CMSA™
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ADDENDUM: STANDARD Q

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CMSA STANDARDS OF PRACTICE FOR CASE MANAGEMENT

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Addendum: Standard Q 2024

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Preface

The Case Management Society of America (CMSA) *Standard Q: Diversity, Equity, Inclusion, and Belonging (DEIB) and Health Equity* "Standard Q" is vital to the professional practice of case management as it addresses the growing need for culturally competent, unbiased, and inclusive care in an increasingly diverse society. This Standard Q is crucial because it promotes equitable care, enhances client-centered care, reduces systemic barriers, and supports professional development through a comprehensive framework.

Standard Q ensures that all clients, regardless of their background or identity, receive fair and just opportunities to attain their best possible health. By addressing health disparities and social determinants of health, professional case managers can help to eliminate unequal health outcomes.

Standard Q reinforces the importance of respecting clients' unique preferences, values, and identities, ensuring their voices are central in the care process. This promotes trust, better client engagement, and improved health outcomes.

By committing to DEIB principles through Standard Q, professional case managers play a key role in dismantling biases and systemic barriers that often prevent marginalized populations from accessing quality healthcare.

Standard Q encourages continuous learning about DEIB and health equity, which empowers professional case managers to improve their cultural competence, advocate for systemic change, and provide more inclusive services.

Incorporating Standard Q into practice strengthens the ability of professional case managers to deliver high-quality, ethical, and inclusive care, ultimately improving both client experiences and overall health equity.

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VII. Standards of Professional Case Management Practice

Standard Q: Diversity, Equity, Inclusion, and Belonging (DEIB) and Health Equity

Standard Q1: Commitment to Diversity, Equity, Inclusion, and Belonging (DEIB) and Health Equity

The professional case manager shall demonstrate a commitment to the principles of Diversity, Equity, Inclusion, and Belonging, and Health Equity in practice. This includes being responsive to all clients' preferences, values, attitudes, beliefs, and behaviors regardless of their identities or status.

HEALTH EQUITY
Health equity means the attainment of the highest level of health for all people, where everyone has a fair and just opportunity to attain their optimal health regardless of race, ethnicity, disability, sexual orientation, gender identity, socioeconomic status, geography, preferred language, or other factors that affect access to care and health outcomes.
Centers for Medicare & Medicaid Services, CMS, n.d.

DIVERSE/DIVERSITY
Involving the representation or composition of various social identity groups in a work group, organization, or community. The focus is on social identities that correspond to societal differences in power and privilege, and thus to the marginalization of some groups based on specific attributes—for example, race, ethnicity, culture, gender, gender identity and expression, sexual orientation, socioeconomic status, religion, spirituality, disability, age, national origin, immigration status, and language. There is a recognition that people have multiple identities and that social identities are intersectional and have different salience and impact in different contexts.
American Psychological Association, APA, 2021b

EQUITY
Critically examining systems to identify biases that prevent equal access and opportunity to individuals.
Merriam-Webster, n.d

INCLUSION
Inclusion is the process of enabling the full participation and contribution of all human resources
in support of the mission of the organization by eliminating implicit and explicit barriers.
Department of Health & Human Services, HHS. 2019

BELONGING
The feeling of security and support when there is a sense of acceptance, inclusion, and identity for a member of a certain group; an individual can bring their authentic self to a space.
Collins *Dictionary, n.d.*

How Demonstrated:

1. The professional case manager shall have the knowledge of the professional case management roles and responsibilities that comprise an inclusive approach to providing services to clients free from bias and discrimination.

2. The professional case manager shall identify critical concepts related to health equity across all practice settings, including specific initiatives to identify health disparities and implement health equity strategies.

3. The professional case manager shall be aware of advocacy policies, practices, strategies, tactics, initiatives, and methods that enrich Diversity, Equity, Inclusion, and Belonging (DEIB) and Health Equity in professional practice.

4. The professional case manager shall evaluate barriers to accessing services and care related to the client's individual preferences, values, attitudes, beliefs, and behaviors.

5. The professional case manager shall provide case management services and interventions that eliminate health disparities and inequalities**.**

Standard Q2: The Client Relationship

The professional case manager promotes the establishment of an environment where all clients feel valued, respected, and included. This entails acknowledging and celebrating client diversity, ensuring fair access to services, promoting psychological safety, and nurturing a sense of belonging for everyone. It involves building trust, confronting biases, and proactively removing obstacles that might hinder specific clients from fully engaging and benefiting from the services offered. Ultimately, it revolves around crafting a positive and inclusive experience for all clients, irrespective of their backgrounds and identities.

How Demonstrated:

1. The professional case manager shall respect and honor all clients' preferences, values, attitudes, beliefs, and behaviors regardless of their identities or status.

2. The professional case manager shall not impose their personal preferences, values, attitudes, beliefs, and behaviors on clients.

3. The professional case manager shall honor the client's choices of providers, practitioners, healers, community-based organizations, and therapists, regardless of the professional case manager's personal preferences, values, attitudes, beliefs, and behaviors.

4. The professional case manager shall understand that a client is a combination of all of the client's identities and shall recognize the intersectionality of a client, all of which must be considered throughout the entire case management process. The professional case manager also acknowledges that diverse cultural identities may face various forms of oppression, intersecting the client's perception of their health and their ability to access culturally competent healthcare services.

5. The professional case manager shall respect and encourage clients to be their true, authentic selves. The professional case manager is also able to express their own authenticity in a professional manner that promotes safety and understanding.

6. The professional case manager shall recognize how their own cultural and identity background informs their practice and

works to provide culturally informed case management services that are free of bias.

Standard Q3: Health Equity Framework

The professional case manager shall understand health inequities as the consequence of systemic injustices that can be reduced by addressing social determinants of health (SDOH), promoting health equity, and reducing disparities. The professional case manager shall understand that health equity includes the client's access to healthcare, the experience of healthcare by the client, the processes and outcomes of healthcare services, and the health status of all served. The professional case manager shall understand how to communicate and reckon with historic and current structural racism and other systemic injustices for other historically marginalized communities. The professional case manager shall embrace and enhance their own cultural competency, humility, and responsiveness in order to achieve health equity. Health equity must be pursued as an intentional strategy since it will not necessarily happen as a by-product of other initiatives. Professional case managers in all healthcare settings (such as health plans, workers' compensation, health systems, clinics, and individual practitioners) shall make every effort to improve health equity for all clients regardless of the demographics of the individuals, communities, or populations served. The professional case manager shall understand that health equity is more than a "check the box exercise" since it requires fundamental changes to clinical, operational, workforce composition and development, and administrative processes that impact the culture of the workplace and result in the inclusion of all clients regardless of demographics.

How Demonstrated:

1. The professional case manager shall identify unwanted variations and differences that are unnecessary, avoidable, unjust, and unfair.

2. The professional case manager shall pursue improvements in clients' physical, behavioral, oral, and social determinants of health and overall health status to achieve health equity.

3. The professional case manager shall participate in public policy activities and legislative efforts related to equity.
4. The professional case manager shall proactively identify the factors that impact health equity for underserved through screening for social determinants of health.
5. The professional case manager shall identify social risk factors contributing to healthcare disparities and inequities.
6. The professional case manager shall utilize theoretical frameworks that measure the causal relationship of health inequities to social determinants of health to identify gaps and promote health equity.
7. The professional case manager shall identify evidence-based practices and participate in improvement initiatives that will address the needs of the underserved community to reduce disparities and promote health equity.
8. The professional case manager shall connect underserved clients to social services and community-based resources for support.
9. The professional case manager shall understand cultural beliefs and health literacy's impact on clinical outcomes.
10. The professional case manager shall work to remove cultural and language barriers in order to connect clients to provider networks and services within their community.

Standard Q4: Communication

The professional case manager is expected to exhibit high proficiency in DEIB (Diversity, Equity, Inclusion, and Belonging) communication skills. These skills are essential in ensuring all clients receive equitable, respectful, and individualized care. The professional case manager must communicate in ways that are accessible, understandable, inclusive, and respectful of each client's identities, names, and terminologies. The overarching goal is to foster an environment of trust, respect, and mutual understanding, facilitating effective and personalized case management.

How Demonstrated:

1. Assessment: The professional case manager shall conduct comprehensive client assessments, including an intentional focus on communication needs. This assessment shall be integral to the initial client evaluation and ongoing interactions to identify any barriers to effective communications.

2. Accessible: The professional case manager shall communicate in culturally appropriate and accessible ways with clients by accommodating the communication needs of clients with sensory, intellectual, cognitive, or other conditions.

3. Understandable: The professional case manager shall communicate with clients in ways that are understandable by accommodating the needs of clients with limitations on literacy, health literacy, digital health literacy, and other literacy situations, as well as using interpreters; strongly recommending the use of Certified Medical Interpreters and translators as identified through assessment.

4. Inclusive: The professional case manager shall communicate with clients in all its forms in ways that are inclusive for all clients regardless of demographics, and this may include incorporating inclusive language guidelines and images that reflect diverse populations and communities.

5. Client Identities, Names, and Terminology: The professional case manager shall use the names and terminology that the client uses, such as their identities, name, gender, pronouns, family members, caregivers, and other self-identification terms regardless of what information about the client that exists in systems or records that the professional case manager uses. When professional case managers use a client's chosen name and pronouns, they send the client a powerful message of respect and validation. This practice is essential for clients from marginalized communities, such as the transgender and gender non-conforming populations, where being recognized by their chosen names and pronouns is a critical aspect of their identity and well-being.

6. Intervention: The professional case manager shall be trained in and utilize "anti-oppressive" practices in all client and workforce interactions. These include interventions that prioritize cultural humility, social justice, racial equity, implicit or other biases, trauma, and anti-racist practices.

Standard Q5: Assessment and Evaluation

The professional case manager carefully selects and uses assessments to exemplify the commitment to Diversity, Equity, Inclusion, Belonging, and Health Equity principles in practice. This includes being responsive to cultural inclusivity and the needs of clients and their caregivers. The professional case manager recognizes the effects of the client's identities, such as age, color, culture, disability, ethnic group, gender, race, language preference, religion, spirituality, sexual orientation, and socioeconomic status. (See Standard J: Client Assessment for further description of practice standard related to assessment.)

How Demonstrated:

1. The professional case manager shall use, whenever possible and feasible, evidence-based assessment tools for a comprehensive biopsychosocial assessment of the client; this assessment shall include the client's cultural values and preferences. The professional case manager shall provide all assessments and evaluations to the client with preferred language and use of medical interpreting services. The professional case manager shall avoid use of inappropriate or discriminatory assessment techniques and the misinterpretation of data.

2. The professional case manager shall use assessment tools and strategies that have been normed on all populations and communities and shall be cautious about using those normed on populations other than the client's. The professional case manager shall evaluate outcomes and continuously change and adapt the assessment to individualize care and SDOH that may affect it. The professional case manager shall understand that SDOH may change and shall base all assessment questions on the individual client, family, and caregiver's needs and support.

3. The professional case manager shall consider the client's preferences, values, attitudes, beliefs, and behaviors and the challenges faced by the client when evaluating the client's progress and adherence to the case management plan of care. The professional case manager shall also consider and honor the client's preferred names and pronouns, which is reflected in all assessments. The professional case manager shall continuously evaluate and update the goals of the care plan as appropriate. Care plans shall be individualized to the client's preferences, values, attitudes, beliefs, and behaviors.

4. The professional case manager shall be aware of and honor the client's cultural meaning of confidentiality and privacy.

Standard Q6: Supervision and Professional Learning and Development

The professional case manager is committed to learning and development, demonstrating a responsibility to the principles of Diversity, Equity, Inclusion, and Belonging and Health Equity in practice. The professional case manager, acting in a supervisory capacity, shall actively pursue inclusion when forming teams, groups, or committees, as well as when training modalities and practices.

The professional case manager, acting in a supervisory capacity, practices intentionally for all to be seen, heard, valued, and welcomed. This conduct drives connectedness and respect**.**

How Demonstrated:

Standard Q6-a. Supervisory/Leadership Standards for Professional Learning and Development

1. The professional case manager who serves in a supervisory or managerial capacity shall commit to diversity in the workforce across the employee lifecycle from hiring, mentoring and sponsoring, promoting, and advancing others.

2. The professional case manager who serves in a supervisory or managerial capacity shall establish mechanisms or processes to address diversity, equity, inclusion, and belonging in relationships with others.

3. The professional case manager who serves in a supervisory or managerial capacity shall advocate for continuous learning and development about DEIB, cultural competency, humility, responsiveness, and health equity for other professional case managers.

Standard Q6-b. The Professional Case Manager Standards for Professional Learning and Development

1. The professional case manager shall recognize implicit biases can influence and contribute to inequity and barriers to service/care. The professional case manager shall engage in learning and development activities that identify their own biases and advances self-awareness.

2. The professional case manager shall ensure that learning and development materials, resources, and events are accessible, understandable, and inclusive for all professional case managers.

3. The professional case manager shall promote DEIB with didactive/teaching environments for all.

4. The professional case manager shall dedicate diverse teaching and training methods to include various learning styles.

5. The professional case manager shall commit to self-assessments of implicit biases and taking inventory of one's feelings and perspectives about DEIB.

6. The professional case manager shall commit to and compel others to create and provide safe environments.

7. The professional case manager shall advocate for diverse representation in teaching, presentations, and conversations for professional case manager development and client interactions.

8. The professional case manager shall participate in relevant conferences and continuing education opportunities to learn more about diversity, equity, inclusion, and belonging and the administrative profession.

Standard Q7: Teams, Organizations, and the Community

The professional case manager shall recognize the quality of interactions with colleagues can influence the quality of services provided to clients. The professional case manager shall work to become knowledgeable about the role of other professionals within and outside the profession. The professional case manager shall respect approaches to case management services that differ from their own and of the traditions and practices of other professional groups with which they work. The professional case manager shall develop positive working relationships and systems of communication with colleagues to enhance services to clients. The professional case manager shall be committed to the equal treatment of all individuals.

How Demonstrated:

1. The professional case manager shall engage in respectful and professional behavior with all colleagues, vendors, suppliers, and individuals from other health and human services organizations regardless of demographics, credentials, educational degrees, job titles, geographic location, and other backgrounds.

2. The professional case manager shall strongly advocate for respect, fairness, equality, and inclusivity and oppose discrimination.

3. The professional case manager shall facilitate discussions, identify key decision-makers, organize events, and nurture employee engagement in embracing diversity, equity, inclusion, and belonging in all aspects of the workplace.

4. The professional case manager shall create, support, and honor an environment where thoughts, ideas, and perspectives matter.

5. The professional case manager shall engage in initiatives that support diverse teams throughout the entire employee lifecycle, including recruiting, hiring practices, promotions and career advancements, mentoring and sponsoring, and departures.

6. The professional case manager shall participate in activities, initiatives, and advocacy to promote a work culture that authentically incorporates Diversity, Equity, Inclusion, and Belonging in all aspects of the workplace.

7. The professional case manager shall participate in activities, initiatives, and advocacy with community-based organizations that serve historically under-served communities, including partnering and referrals when indicated for clients.

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