Integrated Case Management Training Program

Self-Study + Interactive Virtual Instructor-Led Training

CMSA's Integrated Case Management (ICM) program is an intensive, advanced training program designed to help case managers better support complex adult and pediatric populations. The program combines self-study with interactive, virtual instructor-led training focused on practical application.

Today's case managers are increasingly challenged to demonstrate improved health outcomes for individuals with multiple chronic conditions. These clients often face a combination of medical, behavioral health, and social challenges, creating a level of complexity that can feel overwhelming not only for the client, but also for the healthcare team supporting them.

CMSA's ICM program provides practical strategies to engage clients, stratify risk, and develop care plans that help mitigate risk and support improved health and well-being. Training includes review of *CMSA's Integrated Case Management Manual: For Case Managers by Case Managers*, 10–15 hours of self-study, and 12 hours of interactive virtual training focused on applying the ICM method.

COURSE OBJECTIVES

1) Identify approaches that support care for patients/clients with behavioral, physical, and social complexity.
2) Develop skills to move complex, high-cost patients/clients toward health stabilization through comprehensive assessment, communication, integrated care planning, and systematic case management procedures.
3) Demonstrate how to document clinical, functional, quality-of-life, and cost outcomes as part of case management activities.
4) Distinguish the cross-disciplinary application of integrated physical health, mental health, and substance use disorder case management practices.
5) Role-play integrated case management techniques using ICM-CAG tools during supervised virtual case scenarios.
6) Organize tools and resources needed to implement integrated case management after completing the session.

Continuing Education and Certificate Upon Completion
28.5 CEU hours: Nursing, Social Work & CCM CEUs

ICM COURSE CURRICULUM

SELF-STUDY ACTIVITIES:

READ ICM MANUAL

CMSA's Integrated Case Management Manual: For Case Managers, By Case Managers (2nd Edition)

ONLINE TRAINING SESSIONS

Complete five self-paced online sessions aligned with ICM Manual chapter assignments. Each session includes a 25-question quiz.

Section	Topic	Preparation / Focus Areas
One	*Role of ICM in Addressing Complexity*	Ch. 1–3: complexity, integrated approach, medical/behavioral interaction
Two	*Patient Engagement and Retention*	Ch. 4–8: communication, relationships, patient-centered care, social determinants, inequities
Three	*Complex Patient Populations*	Ch. 9–12: adult/pediatric CAG tools, targeted care planning, transitions
Four	*Specialty Populations*	Ch. 13–16: trauma survivors, children with special healthcare needs, veterans, maternal/child health
Five	*ICM in Value-Based Care*	Ch. 17–18: value-based care roles/functions, ICM-CAG as an outcome measure

CASE STUDY ASSIGNMENTS

Submit case study assignments before the virtual instructor-led training session.

- Download assignment details for adult case George and pediatric case Cassie.
- Materials become available after completion of the five online training sessions.

VIRTUAL INSTRUCTOR-LED TRAINING

12 HOURS TOTAL

Four hours per day over three days, delivered as interactive virtual instructor-led training on Zoom.

TRAINING ACTIVITIES

- Interactive communication exercises
- Role-play group exercises
- Review of the integrated case management process
- Practical application of the adult and pediatric complexity assessment grids
- Care planning for complex patients
- Review and evaluation of case studies

VIRTUAL INSTRUCTOR-LED TRAINING AGENDA

*Agenda presented in **Eastern Time Zone***

DAY ONE

Time	Activity
1:00 pm – 1:30 pm	Welcome and Program Overview
1:30 pm – 2:45 pm	Communication, Engagement, and Emotional Intelligence
2:45 pm – 3:00 pm	Break
3:00 pm – 5:00 pm	Motivational Interviewing and MI Exercises
5:00 pm – 5:15 pm	Q&A / Wrap-Up

DAY TWO

Time	Activity
1:00 pm – 1:30 pm	Day One Review and Questions
1:30 pm – 2:30 pm	Using the Adult ICM-CAG and Targeted Care Planning
2:30 pm – 2:45 pm	Break
2:45 pm – 4:00 pm	Using the PIM-CAG and Targeted Care Planning
4:00 pm – 5:00 pm	Case Study: George
5:00 pm – 5:15 pm	Q&A / Wrap-Up

DAY THREE

Time	Activity
1:00 pm – 1:30 pm	Day Two Review and Questions
1:30 pm – 2:45 pm	Case Study: Cassie
2:45 pm – 3:00 pm	Break
3:00 pm – 5:00 pm	Application: Case Studies
5:00 pm – 5:15 pm	Q&A / Wrap-Up

TIME ZONE CONVERSION

Time Zone	Training Time
Pacific	10:00 am – 2:15 pm
Mountain	11:00 am – 3:15 pm
Central	12:00 pm – 4:15 pm
Eastern	1:00 pm – 5:15 pm

ORDER ICM MANUAL

Note: If you have a previous version of the ICM Manual, you will need to purchase the newest version for this training class.

MEMBERS SAVE 30%

Use promo code: **CASE30**

ORDER MANUAL

FACULTY

Rebecca Perez, MSN, RN, CCM, FCM



Rebecca is an experienced Registered Nurse with a master's degree in nursing, is a Certified Case Manager, a member of the Omega Gamma Chapter of Sigma Theta Tau International Nursing Honor Society, Capella University National Society of Leadership and Success, a member of the National Quality Forum Leadership Consortium and most recently was bestowed the Fellow in Case Management distinction.

Her most recent works are primary author for CMSA's Integrated Case Management: A Manual for Case Managers by Case Managers, 2nd Edition; CMSA's Case Management Adherence Guide 2020; CMSA's Case Management Adherence and Transition of Care Guide for Clostridioides difficile; CMSA's Case Management Adherence and Transitions of Care Guide for Hepatic Encephalopathy; Opioid Use Disorder Guide for Case Managers; and Antimicrobial Stewardship Guide for Case Managers.

She is the author of numerous professional articles and resources for CMSA, and speaker on case management topics. Rebecca recently served as the Senior Manager of Education for CMSA and Executive Director for the CMSA Foundation. She is currently the President of Carative Health Solutions, LLC.

Questions? Email education@cmsa.org.