

Center for Patient Partnerships
University of Wisconsin-Madison
Case Management and Educational Processes

Triage identifies key issues. Assesses urgency. Determines if inquiry meets eligibility to become a Center client. When appropriate, refer to external resources.

Assessment identifies client's goals.

Agreement with client establishes an understanding of issues that the client and advocate will be working on/addressing.

Action steps identify initial or additional steps for self-advocacy, and clarify the advocate's role, followed by assistance and information regarding financial or medical decision-making issues.

Ongoing communication includes coaching to improve patient/provider relationships, access quality care, and help clients build self-advocacy skills.

Case closed when role of advocate satisfied, exhausted, or when client has reached sufficient resolution of advocacy issues. **Cases reopened** as needed.

Case management process



Health systems change initiatives

Cases inform collaborative strategies for local and regional health system improvement.

Students carry lessons with them into practice.

Staff participate in local, regional, national and international initiatives to promote patient-centered care.



Educational process

Structured, interactive orientation provides a framework for professional conduct as well as substantive grounding in interpersonal skills essential to effective advocacy and key health care, medical, policy and insurance coverage issues.

Client contact helps broaden students' understanding of the ways "non-medical" issues can influence health care, how patients' priorities can change and how to communicate more effectively with clients, insurers, providers, and employers.

Weekly case discussions introduce students to interdisciplinary consultation, highlighting lessons and possible approaches to advocacy.

Interactions with case supervisors provide insights about resources to help clients navigate complex issues while respecting client values and priorities that may differ from the students'.

Reflections and a community weblog provide opportunities to confer about advocacy issues and health systems change.

Case to cause projects require students to evaluate advocacy processes and innovate to improve the Center's advocacy and education systems.