

CASE MANAGEMENT VENDOR CHECKLIST   
The top 10 questions to ask your vendor

Employers and other health care purchasers may contract independently with case management vendors to provide care coordination and support for their employees and covered family members. Because many of the patients touched by case management vendors are living with serious illness, it’s important that vendors have the appropriate processes, skills, and training to handle these cases. Purchasers can use this checklist to select their vendors, or during regularly scheduled meetings to get the answers they need to know to important questions on vendor competency, and to ensure that their case management vendor is providing sufficient attention and comprehensive resources to the those living with serious illness.

TOP 10 QUESTIONS

**1**

What process is used to identify individuals who are struggling with serious illness and may require specific assessments or conversations? Does the vendor use functional status information, such as difficulty in bathing or dressing, to identify seriously ill individuals?

**2**

How do staffing ratios vary between cases for serious and chronic illness?

**3**

Describe the clinical and non-clinical case management services for adult and pediatric individuals living with serious illness.

**4**

Does the vendor assess for symptom burden? If so, how?

**5**

Does the vendor assess psychosocial and/or spiritual needs? If so, how?

**6**

Does the vendor assess for family caregiver burden and family support needs? If so, how?

**7**

What training and support is provided to case managers to help improve their symptom assessment and management competencies?

**8**

Are the case managers specifically responsible for clarifying goals of care and advance care planning with seriously ill individuals?

**9**

What training and support is provided to case managers to help improve their advance care planning and goals-of-care conversation skills?

**10**

How do the case managers share goals, advance care plans, and assessed needs with the treating clinicians?