

# Geriatric Care Managers

## Your Link to Better Care

By Signe Gleeson, R.N.C., M.S.

**M**artha had seen the deterioration in her aunt Mary over many months. After the death of her husband, Mary became reclusive and forgetful. This concerned Martha and prompted her to arrange a medical evaluation, which showed some signs of dementia. In an effort to help, Martha started assisting Mary with bill paying, grocery shopping and medication management. While Mary accepted Martha's help and increasingly relied on it, she ironically denied she was in need of assistance and refused outside help.

Martha was exhausted and frustrated. She was doing all she could, but her best efforts weren't enough to prevent her aunt's decline. Mary neglected her home and hygiene and she pinned her clothes to fit her shrinking frame. Martha eventually turned to her aunt's doctor for help. He recommended she consult a geriatric care manager, a resource Martha, like many other individuals facing difficult elder care issues, had never heard of.

### What is a Geriatric Care Manager?

Geriatric Care Managers (GCMs) are professionals who specialize in helping older people and their families with long-term care arrangements and needed guidance in an increasingly complex health care system. Most GCMs have training in social work, nursing or counseling and are knowledgeable in gerontology or geriatric issues. GCMs also have extensive information about the cost, quality and availability of services in an older person's community.

As the population of older adults has grown, so have the needs of families caring for them. In response to this need, the number of geriatric care managers has grown proportionally. In 1984, there were only a handful of GCMs working independently around the country. Now there are more than 1,700 members of the National Association of Geriatric Care Managers and many others working in the field.

### Who Needs a Geriatric Care

### Manager?

GCM are a great benefit to individuals or families whose loved one requires more time, skill and resources than they possess or can offer. Because care decisions can be emotionally draining and knowledge of community resources limited, families need a reliable and knowledgeable person to guide them. Geriatric care managers are well-trained and positioned in the community to provide the kind of guidance most families need.

Geriatric care managers provide many vital services, which include:

**Assessment.** Conduct care-planning assessments to identify problems and determine eligibility for various types of assistance and services.

**Consultation.** Review financial, legal or medical issues and offer referrals to geriatric specialists.

**Relocation.** Help move an older person to or from a retirement complex, care home or nursing home.

**Liaison.** Act as a liaison to family members separated by geo-



Everett Munson consults with a GCM on important matters in the privacy of his home.

medical care and make ongoing adjustments as needs change.



## How Does the Care Management Process Work?

### Step 1: Assessment

The initial meeting with a care manager is typically an assessment that is comprised of an interview. Questions cover a range of issues relevant to the older adult's health and living situation, including everyday activities, nutritional status, safety, memory, mood, finances, insurance, and more.

An initial interview most often involves the older adult and their family member. There may be instances when separate meetings with the elder and family may be indicated such as when there are strong disagreements. It is important that the care manager has all the necessary information to design the best care plan for the elder. To this end, the care manager will likely ask permission to contact other involved providers, such as physicians and therapists, to ensure that all relevant information is available.

While most

assessment interviews take place in the home, these can also be performed in a hospital or a nursing home. In that instance, the care manager will seek input from the care providers in the facility and review pertinent records.

### Step 2: Making and Implementing a Care Plan

A care plan outlines the results of the assessment, recommendations, and referrals for local care options. The geriatric care manager will explain the details of the plan, including the rationale for specific recommendations, priority needs and what the family can expect in the short and long term. Recommendations may include specific services, such as adult day care; facilities, such as nursing homes or senior housing; or a referral to providers such as a physician or therapist. The recommendations often include specific behavioral approaches for dealing with resistance and conflict. The report can also offer suggestions for how to advocate for the older adult within the health care system.

graphic distance and alert care members of potential problems.

**Crisis intervention.** Provide guidance and counsel following an unexpected or life-threatening diagnosis or other crisis.

**Implementing a care plan.** Screen potential service providers, arrange care and monitor in-home help.

**Mediation.** Intervene in family disputes over care-related issues.

**Problem solving.** Explore and evaluate options for care.

**Support.** Help caregivers cope with emotional and/or physical burnout, offer counsel, and provide referrals to community resources.

The type and extent of a care manager's involvement is determined in partnership with the family and tailored to the needs of the particular situation. The services of a GCM may be as short as a one-time consultation to help prioritize issues and develop a plan for care. Or, a family may feel they need long-term help to coordinate



Katherine Finkbeiner, who lives in an independent living apartment, is visited by a geriatric care manager who monitors her care.



## Finding the Right Care Manager for Your Needs

As part of the hiring process, it is in your best interest to contact at least two and preferably three geriatric care managers for phone interviews. Use the questions below as a guide to help you assess the competency and experience of the candidate. In assessing the qualifications, don't forget that personality also needs to be considered. This person must be able to communicate effectively with you and your family members while also having the ability to have a comfortable rapport with your loved one.

Think through what your specific needs are before you begin interviewing and it will be easier to choose the candidate that best matches those expectations. You might also want the prospective GCM to send you written information about their practice before making a selection. Here are some important questions to ask:

**1) What are the professional credentials of the GCM?** Does the educational and experiential background fit with your needs? A geriatric care manager should preferably have an undergraduate or graduate degree in nursing, social work, counseling or gerontology. It is also an advantage if the individual has had at least five years working with older adults in a health care or social services setting. Don't be afraid to ask how their background makes them particularly suited to meet the needs of your older loved one.

**2) Length of time practicing in current location?** A GCM is expected to be knowledgeable about local professionals, the services they provide and available resources. This usually takes a GCM at least three years to learn. Individuals who have less local experience may still be competent, but may not be able to offer you the breadth of options that a more experienced GCM could.

**3) Are professional and client references available?** Don't just ask for references,

check them out. Call at least one professional reference, such as a physician or attorney, and one client reference. Questions to ask the references: In what capacity does the professional know the GCM? Does the GCM have the ability to be creative in problem solving? How did you or others benefit from the involvement of the GCM? Would the professional and client source hire or recommend the GCM for services in the future?

**4) What is the cost?** The charges for a GCM typically range from \$80 to \$125/hour. Inquire about whether there is a separate charge for travel time and other expenses. Some charge extra for these items while others do not. Sometimes there is a minimum charge for a visit or consultation. In addition, some care managers ask you to commit to a set number of visits. Find out the arrangement and fee structure in advance so there are no surprises. A select number of long-term care insurance policies cover geriatric care management, but generally, geriatric care management services are not covered by insurance or Medicare.

**5) Does the GCM provide other services, such as home care.** Some see this as a benefit, similar to "one-stop shopping" while others see this as a conflict of interest. Ask the GCM to explain their position and rationale.

**6) Does the GCM provide 24-hour on-call coverage?** Is the GCM available for emergency visits? Many believe that an important benefit of employing a GCM is their ability to problem-solve and advocate in an emergency situation.

**7) How often and in what manner does the GCM communicate with the family?** Does the GCM communicate by phone, in person, by mail, or email? How often do they generally communicate? Be sure to ask what the GCM charges to generate these additional communications.

Once the care plan is in place, the family determines how they want the care manager to be involved in implementing the plan. It can range from the family assuming all responsibility to delegating many tasks to the care manager.

If the caregivers are geographically far from the one needing care, the care manager's ongoing part is usually greater. In these sit-

uations, care managers may find and supervise in-home caregivers, make regular nursing home visits to monitor and review care, consult with medical and other providers to ensure sound communication and coordination of care, and communicate regularly with family members.

Whether near or far from a loved one, a GCM can also arrange

any of the services that are recommended in the care plan. Think of the GCM as a general contractor. It's their job to know the reputable care services in a given area and provide a suitable match to a particular person's needs.

### Step 3: Ongoing reassessments

A care plan should also include regular reassessments to deter-

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mine whether physical, mental and social needs have changed over time. For example, in the scenario of Martha and Mary, Martha had moderate memory loss at the time of her initial assessment. But over time, it got worse and modifications to the care plan were made to accommodate these changes.

### **How do I find a competent care manager?**

As with all services and providers, you should not simply hire the first person who claims to do geriatric-related work. Because there are many interrelated aspects to ensuring the safety and well-being of an older adult, it is critical that the care manager have the expertise and experience to understand and handle many care-related issues.

There are two important steps to finding the right care manager

for your loved one:

**1) Seek referrals from trusted and reputable sources.** These might include your doctor, attorney, clergy, local senior center or hospital social worker. You can also find GCMs through the National Association of Geriatric Care Managers (see Resources below).

**2) Interview candidates carefully.** To ensure that a GCM is qualified and is a good match for your needs, ask pointed questions that help you assess the competency and training of the individual you are considering. See sidebar on previous page.

Currently, there is no state or national licensing of geriatric care managers. Care managers are most often licensed in other fields and can receive certification through the National Academy of Certified Care Managers or the Commission for Case Management Certification. Within professions such as nursing and social work, care managers may have specialty certification, such as a Board Certification as Gerontological Nurse or Certified Social Work Case Manager. There remains some debate on which certifying credential is the most valuable in ensuring expertise and integrity, the two critical criteria for selecting a geriatric care manager. What is guaranteed in finding a GCM with a certification is that the care manager has met educational and experience requirements of the certifying body and has passed exams that verify knowledge of issues in geriatric care management.

Be mindful of a hard sell or someone who promises to “fix everything” or have all the answers. Finding a geriatric care manager doesn’t represent a quick fix. It is establishing a relationship with a

discerning and thoughtful professional who partners with the family to find the best solutions that serve the entire family. ☞

*Signe Gleeson, RNC, MS, is co-founder and president of ElderCare Solutions (www.eldercaresolutions.com), a nurse-run geriatric care management company that has been serving the greater Chicagoland area since 1996.*

### **Resources**

#### **National Association of Geriatric Care Managers**

www.caremanager.org  
1604 N. Country Club Road  
Tucson, AZ 85716-3102  
520-881-8008

#### **National Academy of Certified Care Managers**

www.naccm.net  
P.O. Box 669, 244 Upton Road  
Colchester, CT 06415-0669  
(800) 962-2260

#### **The Center for Case Management**

cfcm.com/resources/certification.asp  
6 Pleasant Street  
South Natick, MA 01760  
(508) 651-2600

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