Medical Case Management Certificate Program  
Scope of Work

The Medical Case Management (MCM) Certificate Program is designed to bring a foundation of best practices and innovative approaches to HIV Medical Case Management service providers. The certificate curriculum was developed to meet the HRSA MCM definition requirements: “Medical case management services must be provided by trained professionals, including both medically credentialed and other health care staff (HRSA Policy Notice 10-02; April 8, 2010).” It is based on best practices and research on MCM, as well as input from AIDS Service Organizations, Ryan White Grantees, and feedback from over a thousand HIV medical case managers who have gone through the program.

The goal of the MCM Certificate Program is to provide learners with a solid knowledge base, along with the clinical skills required to succeed with a diverse set of client needs. The MCM program also ensures that all workers in a system have a reliable foundation of current information about work in HIV/AIDS. This assists in establishing consistency from worker to worker and agency to agency, strengthening the continuity of care.

To accomplish this goal, Coldspring Center offers two versions of the program. The first is a combination of in-person and online trainings. The second is an online-only version. Note: most of the courses listed below range from 20 to 40 minutes in length. Coldspring Center provides the online trainings and manages them through a learning management system, which provides leaders with learner progress reports.

Option 1: In-person and Online Curriculum:

In-person trainings
This two day interactive and experiential training dives into the core of what it means to be a medical case manager and how to achieve maximum outcomes with clients. The in-person training provides an organization or system of care with a common language and focus, which can facilitate long-term change and improved quality of services. The in-person training builds on the content presented in the online training. It provides additional information and skills practice to build confidence and ability, and includes:

1. **Motivational Interviewing Skills Building** – Focuses on the implementation of theory and approaches introduced in the Motivational Interviewing online training to improve confidence and practical application of the skills.
2. **Trauma Informed Medical Case Management** – Includes information on the impact of stress and trauma, how these impact the brain and behavior, and provides a framework to understand the MCM’s role in working with a stressed/traumatized client.
3. **Thrive: Self-Care** – Examines the importance of the health and well-being of the case manager, and provides concrete tools that can be utilized immediately.

Online Training Series: Foundations in the Helping Professions Series
The first set of online trainings are in the Foundations Series, which contains courses that are the foundation to HIV MCM. These include:

1. **Introduction to the Medical Case Management Certificate** – Provides an introduction to the certificate and a presentation of best practices in Medical Case Management.
2. **Structuring the Helping Relationship** – Includes information on boundaries, ethical decision making, and mandatory reporting.
3. **HIPAA and Confidentiality** – Examines the importance of confidentiality and privacy practices in MCM.
4. **Multicultural Approaches in the Helping Relationship** – Looks at effective ways to work across different client populations.
5. **Understanding and Handling Difficult Situations** – Examines how to work with escalated and angry clients.
7. **HIV and the Immune System** – Covers the biology and life cycle of HIV, discusses how HIV progresses to AIDS, and defines and briefly discusses common opportunistic infections and co-infections.
8. **HIV Treatment and Medications** – Includes information on the different types of HIV medications, how they affect the HIV life cycle, possible side effects, the importance of adherence, and information about lab tests and other monitoring.

**Online Training Series: Motivational Interviewing (MI) Series**

The next set of online trainings is Coldspring Center’s Motivational Interviewing Online Training Series. According to MI’s founders William Miller and Stephen Rollnick, “Motivational interviewing is a collaborative, goal-oriented style of communication with particular attention to the language of change. It is designed to strengthen personal motivation for, and commitment to, a specific goal by eliciting and exploring the person’s own reasons for change within an atmosphere of acceptance and compassion.” Motivational Interviewing is a critical tool for HIV MCM. Many clients have substantial difficulty making changes around lifestyle and treatment which are needed to live a healthy life with HIV. These courses are designed to provide all the information one needs to implement MI effectively with clients, and include:

1. **Motivational Interviewing Basics** – Presents an overview of the basics of MI and the Motivational Interviewing Series.
2. **Motivational Interviewing & Stages of Change** – Examines how medical case managers can utilize the Stages of Change together with MI to help conceptualize the change process.
3. **Motivational Interviewing Step 1: Engage** – Demonstrates how to use the four key MI strategies (steps) to assist clients through their change. This training presents the first strategy, the Engage Step, and how to help clients see the need and possibilities for change.
4. **Motivational Interviewing & Harm Reduction** – Demonstrates how MI and Harm Reduction can be used together to better engage clients in care and set up both programs and clients for success.
5. **Motivational Interviewing Step 2: Focus** – Provides strategies to help clients focus in a way that promotes positive life changes.
6. **Motivational Interviewing Step 3: Evoke** – Offers strategies to bring out change talk that increases the likelihood that positive change will occur.
7. **Motivational Interviewing & the Importance Ruler** – Examines a key strategy that medical case managers can utilize to build both confidence and motivation to change.
8. **Motivational Interviewing Step 4: Plan** – Helps medical case managers integrate MI language into service planning.
9. **Motivational Interviewing & Medical Adherence** – Provides medical case managers with research and strategies to maximize adherence and self-management through MI and other best practices.
The in-person sessions are facilitated by Matt Bennett, MA, MBA. A dynamic trainer, Matt’s expertise takes him around the country speaking on topics including: trauma, leadership, quality improvement, Motivational Interviewing, and resiliency. Matt has successfully combined his academic pursuits as a researcher and published author with his practical experience as a therapist and administrator of nonprofit organizations and educational institutions. This combination of the academic and the pragmatic has led to research-based solutions which improve the health of individuals, organizations, and systems.

Note: Learners will be asked to complete the online portion of the program before attending the in-person training.

**Option 2: Online Only Curriculum:**
The Online Only Medical Case Management Certificate includes Coldspring Center’s popular Trauma Informed Excellence (TIE) Training Series in addition to the Foundations in the Helping Professions Series and Motivational Interviewing Series described above. The TIE Series includes two trainings, both with several courses:

**Online Thrive: Self-Care & Culture Training**

Presents the dangers that can impact the well-being and effectiveness of medical case managers. Thrive also presents strategies designed to improve medical case managers' overall health while maximizing efficiency and effectiveness. Thrive includes the following courses:

1. **Stress & Burnout** – Examines how to effectively approach the work of helping in the face of stress and burnout.
2. **Helping Trauma** – Examines the dangers that result when trauma overwhelms the helper's ability to manage the work effectively.
3. **Physical Robustness** – Focuses on strategies and approaches designed to improve the helper's physical, cognitive, and emotional health, as well as improve the quality of the services medical case managers deliver.
4. **Mind Robustness & Mindsight** – Focuses on strategies to improve the helper’s health and quality of work through building mind robustness and mindsight.
5. **Mind Robustness & Focus** – Offers strategies and approaches for the helper, designed to better utilize the brain and maximize cognitive capacity.
6. **Social Robustness** – Provides information on how personal and professional relationships can help improve robustness and resiliency.

**Online Trauma Informed Care Training**

Examines the impact of trauma on clients and how medical case managers can assist in the client’s journey to post-traumatic growth. Trauma Informed Care includes the following courses:

1. **Foundations of Trauma Informed Care & Physical Resiliency** – Covers basic information on trauma, differentiates between trauma informed care and trauma specific treatment, and explains how medical case managers in various roles can successfully work with traumatized clients.
2. **Trauma & Social Health** – Explores the impact of trauma on the social health of the client.
3. **Social Resiliency** – Looks at the importance of clients’ social resiliency and the role of medical case managers and organizations to help clients maintain healthy and safe relationships.

4. **Trauma & Mind Health** – Explores the impact of trauma on the mind health of the client.

5. **Mind Resiliency** – Offers specific strategies medical case managers can use to improve the mind resiliency of their clients.

6. **Post Traumatic Growth & Assessment** – Introduces the concept of Post Traumatic Growth as a foundation for trauma treatment, and presents information on best practices in trauma assessment, within both therapeutic and non-therapeutic contexts.

7. **Research-Based Methods** – Provides a general overview of the evolving field of trauma specific treatment and a knowledge base to make appropriate referrals.

**Coldspring Center Qualifications and Expertise**

Coldspring Center brings a wealth of HIV-specific experience to the development of the MCM Certificate Program. While Matt Bennett will facilitate the in-person training, content development and online training support is provided by Bettina Harmon, M.Div., Brooke Bender, MPH, and Kate Leos. Combined, the Coldspring Center team brings decades of experience working with the clinical, programmatic, and administrative aspects of Ryan White and HIV programming. This experience includes presenting the MCM Certificate Program with the Part A Grantees in San Juan, Puerto Rico, Austin Texas, and Denver, Colorado; Part B Grantees in Colorado, Washington, Minnesota, Iowa, Nebraska, North Carolina, and Arizona; ASOs in New Mexico and Colorado; as well as presenting at the HIV & Social Work Conference in Chicago, Miami, and Atlanta. Additional HIV-specific experience includes the following.

- Experience as HIV MCMs and HIV MCM supervisors
- Support for CAREWare data management
- Development of comprehensive plans
- Plan and execution of needs assessments
- Create and revise standards of care for a wide range of funded categories
- Plan and execute annual site visits
- Develop Quality Plans
- National review of Medical Case Management best practices in HIV and other chronic diseases
- Create web-based resource inventory software (http://directory.acecolorado.org)
- Provide the technological and subject expertise for the creation of a web-based Ryan White Planning Council New Member Orientation & Leadership Trainings (http://dhrpc.org/)
- Assist in the creation and updating of organizational Documents (Bylaws, Conflict of Interest, Confidentiality, New Member Orientation) for an HIV Planning Council
- Present at a number of HIV-related conferences including:
  - HIV and Social Work National Conference
  - HRSA ALL Titles/Parts National Conference
  - Pittsburg World AIDS Day Conference
  - AIDS Coalition for Education Conference
Responsibilities
Coldspring Center will be responsible for the following:
- Management of online training registration, online training progress reports, and certificates, including direct email contact with learners
- Training content
- Facilitation of workshops (in-person only)
- Training evaluation and final evaluation report
- Management of Continuing Education Credits (CECs) from NASW-CO
- Travel arrangements in collaboration with contractor (in-person only)

Coldspring Center proposes that the contracting organization provide the following:
- Coordination of training dates and location (in-person only)
- Sites (in-person only)
  - Arrangements to be finalized and communicated to Coldspring Center and workshop attendants at least 1 month in advance of session
    - Projector and projection screen at each session
    - Flip chart paper, preferably sticky (tape if not sticky)
  - Set up of tables, chairs, etc.
  - All fees
- Catering (Coldspring Center is happy to function as the fiscal agent, if requested)
  - All arrangements
  - All fees
- Work with Coldspring Center staff to establish a timeline for completion of online training
- Communication with workshop registrants regarding certificate timeline and expectations
- Printing of materials (handouts, worksheets, and session evaluation) (in-person only)
- Travel arrangements in collaboration with Coldspring Center (in-person only)
- All fees as stated below

Fees

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<th>Option 1: Online &amp; In-person Curriculum</th>
<th>Cost:</th>
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<tbody>
<tr>
<td>Item</td>
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<tr>
<td>2 Days of In Person Training and Facilitation</td>
<td>$4,000</td>
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<tr>
<td>Access to Foundational and Motivational Interviewing online training series</td>
<td>$200 per learner</td>
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<td>Travel Expenses (Airfare &amp; baggage, ground transportation, hotel, meals)</td>
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<tr>
<th>Option 2: Online Curriculum</th>
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<tr>
<td>Item</td>
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<tr>
<td>Access to Foundational, Motivational Interviewing, and Trauma Informed Excellence Online Training Series</td>
<td>$350 per learner</td>
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References:
Available upon request