

COURSE SYLLABUS

Utilization Management & Managed Care Guidelines Fundamentals

Case Management Institute

COURSE INFORMATION

Course Title	Utilization Management & Managed Care Guidelines Fundamentals
Provider	Case Management Institute, LLC (CMI)
Target Audience	Registered Nurses (RN), Licensed Practical Nurses (LPN), Advanced Practice Nurses (APN), and other licensed healthcare professionals
Total CE Hours	9 Contact Hours (4 hours via Case Management Institute LMS + 5 hours via MCG Health LMS)
Delivery Format	Self-paced online learning with instructor feedback
Course Duration	Up to 6 months from the date of enrollment (determined by MCG CareWeb platform access expiration)
Typical Completion Time	4 to 6 weeks
Delivery Platforms	CMI LMS and MCG's LMS; Simulation Lab via MCG CareWeb

COURSE DESCRIPTION

This course provides a comprehensive foundation in utilization management (UM) and Managed Care Guidelines for nurses and other licensed healthcare professionals seeking to transition into or advance within utilization management roles. Through a combination of didactic content, case scenarios, and hands-on simulation using MCG Health's CareWeb platform, students develop practical skills in the utilization management process, reimbursement principles, insurance types, healthcare legislation, levels of care, and discharge planning.

A defining feature of this course is its Simulation Lab, delivered through MCG's CareWeb platform. The Simulation Lab provides hands-on experience applying MCG Care Guidelines — the industry-standard clinical decision-support tool used by health plans, hospitals, and managed care organizations nationwide.

Upon successful completion, students will have earned 9 continuing education contact hours and will meet the eligibility requirements to pursue the Care Guidelines Specialist – ISC/GRC certification through MCG Health.

COURSE INSTRUCTORS

Lead Instructor	Deanna Cooper Gillingham, RN, CCM, FCM
Instructor	Dr. Colleen Morley, DNP, RN, CCM, CMAC, CMCN, ACM-RN, FCM, FAACM
Instructor	Nadine Carter, MBA, BSN, RN, CDMS, CCM, FCM
Contact	Support@CaseManagementInstitute.com

PREREQUISITES & ELIGIBILITY

Students must meet the following requirements to enroll in this course:

- An active, unrestricted license as a Registered Nurse (RN), Licensed Practical Nurse (LPN), Advanced Practice Nurse (APN), or other licensed healthcare professional is required.
- No formal coursework prerequisites are required.
- A minimum of one year of acute care nursing experience is strongly recommended to support application of course content. Students without this background may find certain clinical scenarios more challenging.

COURSE STRUCTURE & PLATFORMS

This course is delivered across three platforms and includes a simulation lab component. Students must complete all three components to receive credit and a certificate of completion.

Part 1 — Case Management Institute LMS (4 CE Hours)

The foundational didactic content is delivered through the Case Management Institute learning management system (LMS). Students progress through ten modules covering utilization management principles, reimbursement, insurance types, Medicare and Medicaid, healthcare legislation, levels of care, and discharge planning. Each module includes quizzes that must be passed before advancing to the next section.

Part 2 — MCG Health LMS (5 CE Hours)

Advanced content is delivered through MCG Health's learning management system, providing students with access to MCG's clinical guidelines and utilization management tools. This portion of the course awards an additional 5 continuing education hours.

Part 3 — Simulation Lab (MCG CareWeb Platform)

The simulation lab is conducted within MCG Health's CareWeb platform, which provides a real-world practice environment for applying utilization management skills using MCG care guidelines. Instructor feedback is provided throughout, and students may make multiple attempts to meet the passing standard. Access to MCG CareWeb expires six months after it is granted; students must complete this component within that window.

CURRICULUM OVERVIEW & LEARNING OBJECTIVES

All learning objectives are written in accordance with Bloom's Taxonomy and are designed to be attainable, measurable, and directly applicable to current nursing practice. Upon successful completion of this course, students will be able to demonstrate competency across the following ten modules.

Module	Topic	Upon completion, students will be able to:
Module 1	Utilization Management: Principles & Process	<ul style="list-style-type: none"> Differentiate between utilization review and utilization management. Explain the reasons for using utilization review/management. Describe the main types of utilization management. Perform the utilization management process. Compose documentation supporting approval of requested services. Explain the appeal process and summarize available appeal types. Determine the reason for a denial.
Module 2	Reimbursement Principles	<ul style="list-style-type: none"> Define key insurance terms. Calculate a patient's out-of-pocket cost given service cost, copayment, deductible, and coinsurance. Determine primary and secondary insurance when a patient has multiple policies. Discuss various reimbursement and payment methodologies in use today. Explain the various types of insurance available today. Describe COBRA and identify who is eligible. Describe key provisions of the Affordable Care Act. Identify patients who may be eligible for Medicaid or Medicare. Summarize the Medicaid and Medicare hospice benefits. Identify what is covered under each of the four parts of Medicare. Explain the purpose of Medigap insurance. Differentiate between Medicare and Medicaid. Explain Medicare reimbursement and classification systems for various services. Apply the Two-Midnight Rule, Medicare Inpatient-Only List, and Medicare Outpatient Observation Notice (MOON). Explain the implications of the Two-Midnight Rule for patients and case managers.
Module 3	Healthcare Legislation	<ul style="list-style-type: none"> Apply healthcare-related legislation to utilization management and utilization review. Explain how the Affordable Care Act enhanced previous mental health legislation. <p>Identify key federal statutes affecting utilization management practice.</p>
Module 4	Levels of Care & Care Settings	<ul style="list-style-type: none"> Compare different care settings and the level of care provided in each.

Module	Topic	Upon completion, students will be able to:
Module 5	MCG Inpatient & Surgical Care CareWeb Training & Case Scenarios	<ul style="list-style-type: none"> Choose the appropriate rehabilitation delivery system for a given patient. Identify tools and factors used to assess acuity, severity, and physical functioning.
Module 8	MCG General Recovery Care CareWeb Training & Case Scenarios	<ul style="list-style-type: none"> Determine appropriateness for procedures or acute care admission. Assess observation vs. inpatient criteria and manage inpatient stays. Evaluate stay extensions Evaluate discharge readiness and apply discharge planning tools.
Module 9	MCG Home Care CareWeb Training & Case Scenarios	<ul style="list-style-type: none"> Determine appropriateness for admission to home care. Describe the General Treatment Course. Evaluate home care status and identify applicable discharge planning resources.
Module 10	MCG Recovery Facility Care CareWeb Training & Case Scenarios	<ul style="list-style-type: none"> Determine appropriateness for subacute and inpatient rehabilitation levels of care. Determine appropriate care at IRF and SNF levels. Develop a recovery facility course of care and apply discharge planning resources.

GRADING & COMPLETION REQUIREMENTS

Students must successfully complete all three course components — the Case Management Institute LMS modules, the MCG Health LMS content, and the Simulation Lab — to receive a certificate of completion and qualify for MCG certification eligibility.

LMS Module Quizzes (Parts 1 & 2)

- A minimum score of 80% is required to pass each quiz and advance to the next module.
- Students who do not achieve 80% on a first attempt are permitted one (1) retake of that quiz.
- Students who do not achieve 80% after two attempts must contact the Case Management Institute support team to request additional attempts. Additional attempts are granted at the discretion of the support team and are intended for students who have reviewed the relevant material. This policy exists to protect the integrity of the educational program.

Simulation Lab (MCG CareWeb)

- The Simulation Lab is graded on a pass/fail basis through holistic assessment by a course instructor.
- Instructor feedback is provided throughout the simulation, and students are permitted multiple attempts to meet the passing standard.
- Students must complete the Simulation Lab within the six-month CareWeb access window.

CERTIFICATES & CREDENTIALS

Upon successful completion of all course components, students will receive the following:

Certificate of Completion

- A certificate reflecting 9 continuing education contact hours (4 hours from Case Management Institute + 5 hours from MCG Health).
- Documentation of completion of the MCG Health CareWeb Simulation Lab.

MCG Certification Eligibility

- Successful completion of this course fulfills the eligibility requirements to sit for the Care Guidelines Specialist – ISC/GRC certification offered by MCG Health.
- The certification examination and credential are administered exclusively by MCG Health and are subject to an additional fee. Case Management Institute is not responsible for the administration, scheduling, or costs associated with the MCG certification process.
- Students interested in pursuing this credential should contact MCG Health directly upon course completion.

COURSE POLICIES

Enrollment & Access

Students have six (6) months from the date MCG CareWeb access is granted to complete all course components. Because the CareWeb access expiration date governs the overall completion window, students are strongly encouraged to begin the Simulation Lab component promptly after access is granted. One extension to the CareWeb access period may be granted at an additional fee. Additional access is not guaranteed.

Refund Policy

Due to the digital nature of this course and the immediate access provided to course materials and the MCG CareWeb platform upon enrollment, no refunds will be issued after purchase. Please review all course information carefully before enrolling.

Academic Integrity

Students are expected to complete all quizzes and assignments independently and honestly. The quiz retake policy — which limits attempts before requiring contact with the support team — is in place to ensure that course credit reflects genuine engagement with the material. Attempts to circumvent assessments through guessing or other dishonest means are a violation of this policy and may result in removal from the course without a refund.

Accessibility & Accommodations

Case Management Institute is committed to providing an equitable learning experience for all students. Students who require accommodations due to a documented disability or other qualifying need are encouraged to contact the support team prior to beginning the course. While this course is delivered in a self-paced online format, we will make reasonable efforts to accommodate documented needs on a case-by-case basis. To request accommodations, please contact the support team at Support@CaseManagementInstitute.com before beginning coursework, as retroactive accommodation requests may not be possible.