

Case Management Intake

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Faculty Disclosure

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Learning Objectives

By the end of this session, the learner will be able to:

- accurately assess client needs through comprehensive data collection,
- demonstrate skills in establishing rapport and trust,
- utilize appropriate referral systems to advance the continuity in care

Intake Assessment: Why?

To determine medical and psychosocial needs

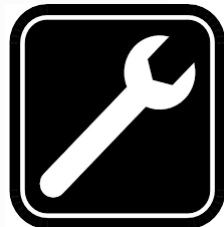
to discover gaps in service provision

to identify existing resources

To evaluate the client's strengths



Intake What: Needs to Identify



Intake How: Establishing rapport and trust

Active listening

Open-ended questions

Person-centered approach

Positive body language

Cultural sensitivity

Empathy

Confidentiality

Respectful communication



Appropriate Self-disclosure

Identifying Rapport- and Trust-Building Skills

Meet Andi



Andi is 55yo male, recently immigrated from a rural town in eastern Europe.

Andi has been experiencing a high level of anxiety since being diagnosed with HIV three weeks ago. At the urging of his wife, he finally agrees to access case management services. He has never believed in “getting help” especially from strangers who have to pry into his private life.

Andi is willing to see a doctor, is ambivalent about medication, and is very nervous about getting case management. He has always believed that needing assistance means that a person is weak. He is also concerned that his deepest fears and regrets will be revealed. He is especially worried about others finding out what he tells the case manager.

Andi is greeted with warmth and friendliness by his case manager, who offers him a beverage as they enter the office. The case manager makes excellent eye contact and speaks in a soothing voice while making small talk about the beautiful weather outside. The case manager briefly mentions trying to grow a tulip garden despite not having a green thumb.

What 3 rapport-building skills has this case manager demonstrated?

Open-ended questions

Positive body language

Confidentiality

Appropriate Self-disclosure

Person-centered approach

Identifying Rapport- and Trust-Building Skills

During intake, the MCM asks Andi the following questions:

How are you doing today?

Did you find the office okay?

Tell me about yourself.

What concerns do you have about your care being discussed with your doctor?

What do you consider your greatest strengths?

What are the primary areas you would like to focus on during this phase of your care?

How do you hope to see yourself in the future?



What 3 rapport-building skills do these questions illustrate?

Positive body language

Empathy

Respectful communication

Open-ended questions

Confidentiality

Identifying Rapport- and Trust-Building Skills

What are the best demonstrations of cultural sensitivity that the case manager can use during the intake process?

Greeting and Language: The case manager ...

explains the purpose the intake process clearly and simply, avoiding jargon, and using visual aids where appropriate.

Cultural Context: The case manager ...

asks open-ended questions about Andi's experience in the United States, including length of stay, reasons for migration, and any cultural practices that might be important.

Respecting Beliefs and Practices: The case manager ...

inquires about any religious observances that might impact Andi's access or adherence to services.

Adapting Assessment Tools: The case manager ...

explains complex questions from the standardized intake forms, provides options to ensure Andi can accurately respond within a cultural context.

Connections to Care: to where?

REFERRAL TYPES

Direct
Facility
specialist

REFERRAL CONSIDERATIONS

Needs
Culture
Location
Follow-up

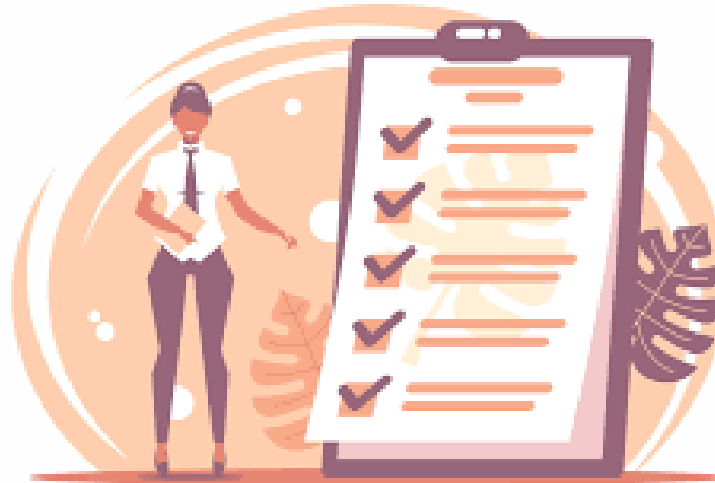
RESOURCES

Hotlines
Community-
based



Connections to Care: to where?

But first . . .



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. . . **The Care Plan!**

Where to go . . .

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AETC Program

National Centers and National HIV Curriculum

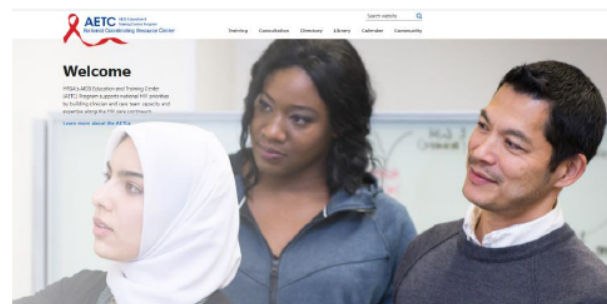
- National Coordinating Resource Center serves as the central web based repository for AETC Program training and capacity building resources; its website includes a free virtual library with training and technical assistance materials, a program directory, and a calendar of trainings and other events. Learn more: <https://aidsetc.org>
- National Clinician Consultation Center provides free, peer to peer, expert advice for health professionals on HIV prevention, care, and treatment and related topics. Learn more: <https://nccc.ucsf.edu>
- National HIV Curriculum provides ongoing, up to date HIV training and information for health professionals through a free, web based curriculum; also provides free CME credits, CNE contact hours, CE contact hours, and maintenance of certification credits. Learn more: www.hiv.uw.edu

Additional Resources:

National Coordinating Resource Center

The AETC NCRC website aidsetc.org includes:

- Free virtual library with training and technical assistance materials
- Program directory for AETC Program
- Calendar of AETC trainings and other events
- Online learning and training tools



The AETC NCRC Social Media Channels:

- Free [Facebook](#), [Twitter](#), [YouTube](#), [LinkedIn](#), and [Pinterest](#)
- *HIV Care Tools mobile app coming soon!*

THANK YOU FOR YOUR ATTENDING!

