Case Management Skill Building: Claire

This was an interesting exercise, I never felt prepared enough for it, I did role-play before, but not with forms that I had to write upon or even explain to our "client". At times, I felt intimidated by how much better I perceived my classmates to be at playing the part of Human Services Worker. Other times I felt lost because it took me a while to figure out how to deal with Claire, my difficult client. It was no longer interviewing a client but also trying to follow a thread of case notes and covering every required paper that we will need to serve a person. Being a "client" was challenging as well, I tried not to be the easy client while avoiding extremely difficult reactions. Most of all I am grateful for the feedback I got from my classmates and I have a new appreciation for paperwork.

**When I was the Human Services Worker (HSW)**

Anxiety was the key word when I had to play the role of HSW. I do not like being put on the spot, the more I thought of the things I was expected to be doing, the more I forgot them or messed them up. There is a bit of pressure with trying to get all of the information right and not letting the client see how nervous I was. It was overwhelming at times, especially when the client tried to tell you everything about their life and you had to bring them back into the interview. For some reason I kept thinking about issues with time. How long do agencies allow caseworkers to spend with each client? I did try to focus on issues my client presented and I was not prepared to take notes on a separate sheet of paper, this was corrected after the first encounter. I did find it easy to have a written account to go back to after the initial interview because this way it was easier to summarize what had happened before and to check up on the client as to what and if she followed up on the service plan we had agreed upon. There were times when I felt like this particular scenario was beyond my scope of expertise, well, this woman is schizophrenic and wants to have a child but, she was already seeing a mental health professional and a primary care physician so why come to me? I ended up sending her back with specific questions for her doctors and also bringing her husband in and evaluating what he knew and how he felt about his wife's decision. It tuned out that the husband did not know what he was dealing with and had no idea of what a psychotic episode was. I decided to learn his point of view on becoming a parent. I also wanted to know what he thought it would be like for Claire to be off medication for the entire pregnancy. He knew nothing and I gave him a couple of videos on psychotic episodes and schizophrenia. I also set up counseling for the both of them. In the end, Claire was scared of her own symptoms and decided it was best to go back to taking her medication, they were considering adoption or surrogacy for the future, more follow up was in order with the mental health professional and the primary care physician. I wish all cases would resolve like this one.

**Being the Client**

Playing the client was not easy; to be able to get in the mindset of someone who has all those challenges was strange. I played Jessica, mad, ill, wounded woman. I tried getting rid of my own thoughts and act the way she would act, I was mad, I resented everyone and I had no self-esteem. Trusting the case manager was difficult and I was pushed to go out and face the world. I was free from taking care of "my mother" and I was given another chance at independence. My case manager (Susan Diehl Sather) was cheering me on every step of the way and planting happy thoughts in my mind, it was not bad, but it did not feel right sometimes. Who was she to tell me what I had to do and how I should react to my situation? It was hard not to become defiant and tell her to go away. Sometimes while I drove home, I would think about how lucky I really am and how great it would be to make a difference in someone's life by helping them believe in themselves. As Jessica, I felt ashamed to be asking for help and for being so vulnerable and seemingly weak. This was an insightful exercise; it was good to think like a client and realize how a client might want to be treated.

**The Observer Role and Lessons from my Peers Role Playing**

The observer was a person without all the weight of having to perform a role as someone else. I can say that as I observed, many things stood out to me. I would have overlooked many things if I were concentrating on communicating with another person. I was able to see a case manager asking some double questions and jumping from one subject onto something completely different. The observer gave some valuable feedback, whether things went well or not.

Seeing my classmates as they played their roles made me think of the things I would do in their place. Perhaps I would ask questions about family life or as the client, I might come across a tad lessor more cooperative. I found their unique case management styles interesting, whether it was their tone of voice calming the client down or how good they were at asking open-ended questions. At first, they seemed to be stiff and a bit awkward, but soon enough their personality came through and the interview would become an example of what a case manager should do, mindful of laws, centered on the client's needs and respectful of the client's rights and of their contribution to the service plan. I particularly liked the way my peers would encourage their clients. Joshua S. was always professional but his face would light up when he saw the client understanding what he was explaining about the service plan or when he learned about the client successfully following up on his suggestions. Another example of important things to remember as a case manager was Kassie Lint; she was always very thorough when summarizing previous meetings with her client, her rapport building and the way she established her professional boundaries were great. The way she asked about the client's situation showed empathy and highlighted her superior case-note-writing-skills. Overall, I enjoyed watching my peers' role-playing, I saw many desirable qualities in all of them and I know that they will be wonderful when the time comes for them to interact with real clients.

**What I Learned From Reading my Peers' Case Files**

One of the things that stood out the most to me was the fact that some case notes were short, some were indecipherable, and others were clear and concise. It is important to be able to read each other's handwriting since we are not typing all the information during an interview, unless an agency requires this. Clear and concise case notes allow us to be able to take over a case and follow up on it. Documenting a case is an essential skill that requires practice and being open to constructive criticism. Some of the case notes identified the client's strengths and weaknesses and the idea helps a lot, especially when taking over somebody else's case.

**My Future**

When building a client's file, there are many things I need to remember such as, scratch paper to jot down ideas as they come to me, writing short, relevant case notes that anyone can understand. Communicating clear ideas and setting professional boundaries as soon as possible eliminates misunderstandings and helps building trust with our client, because they will know what we are willing to give them and what we expect out of our relationship. I also need to be mindful of time-management and I must use up time wisely. Remembering to ask the client if they have any questions or if they have any parting thoughts confirms our commitment to client-centered-services. Being a Human Service Professional is not easy, practice and focus will help us in real-life situations. I must never forget that I can learn from anyone and I ought to conduct myself as an example for others. I have hope and commitment towards my career in Human Services.