

## **Converting Needs Assessment into Conversational Dialogue**

A better approach to completing the Comprehensive Needs Assessment with clients is to approach the encounter and information gathering process as a conversation rather than it being completing a tool by asking questions. Rapport and trust building with clients is a pillar of case management services. This is not a cookie cutter process and should be tailored to meet specific dynamics and needs of each client.

This baseline dialogue will be modified to better reflect how a conversation should go between a Case Manager and Client in order to get all the information that is needed.

### **Medical Care**

**CM** Thanks for meeting with me today. Our goal is to complete a required tool for the program that's called the Comprehensive Needs Assessment. This tool is going to cover multiple different aspects of your life to try and give me as your case manager baseline information which will help me know what resources and services you might need currently or might need in the near future. I just wanted to remind you that everything that is discussed between you and I stays between us and is bound by HIPAA.

Let's start by talking about your health care. Are you currently seeing a doctor regularly?

**Client** Yes, I see Dr. Conde at PRTTC for my HIV care.

**CM** That's great to hear. Do you currently have a Primary Care Provider?

**Client** Yes, Dr. Doe is my PCP at Local Family Health.

**CM** Perfect. Do you feel comfortable with them, and do you feel you're getting the care you need?

**Client** Yes, they're good

**CM** I'm glad to hear that. Do you happen to know off the top of your head when the last time you saw both Dr. Conde and Dr. Doe was? Or when your next scheduled appointments are with them?

**Client** Yeah, I just saw Dr. Conde last week on Wednesday and I'll see her again in 3 months. I don't remember the specific date, but I have it on my calendar on my fridge at home. Dr. Doe, I saw him back in November and I usually only see him twice a year or call him when I have something going on and need to be seen. I don't remember when my next appointment is with him

### **Medical History**

**CM** Can you tell me a little about your health history? For example, have you had any serious illness or have you been hospitalized within the past 5 years? If so which hospital where you at?

**Client** I was in the hospital a couple of years ago with pneumonia, but nothing since. It was at Holmes Regional

**CM** Okay, thanks for sharing. Have you been diagnosed with any conditions like diabetes, high blood pressure, or other ongoing health issues?

**Client** No, I don't think so.

**CM** Alright. And how about testing for things like TB, hepatitis, or other infections – have you done any of that recently?

**Client** Yeah, I've been tested and everything came back okay

**CM** Any history of sexually transmitted infections?

**Client** I've was diagnosed with and treated for chlamydia back in 2022.

**CM** Thanks for sharing that with me. Have you ever been told that you had an opportunistic infection?

**Client** I'm not sure I know what those are.

**CM** An opportunistic infection is any number of conditions that you're more likely to acquire when you're immune system is compromised and your T-cell count is below 200.

**Client** No, I would remember something like that.

### **Medications and Adherence**

**CM** Let's talk about your medications. Are you currently taking any, including over-the-counter ones?

**Client** Yes, I'm on Biktarvy and a daily multivitamin

**CM** How's that going? Are you able to take them as prescribed, or do you sometimes run into challenges?

**Client** I do okay most days, but sometimes I forget.

**CM** That's common. If it would help, we can talk about tools or strategies to make it easier. What about any drug allergies or known adverse reactions to any medications?

**Client** I'm allergic to sulfas and penicillin.

**CM** Thanks for letting me know. Do you have a preferred pharmacy that you usually always use?

**Client** Yes, I used Publix pharmacy for most of my needs.

**CM** Great, which Publix pharmacy do you normally fill at?

**Client** The one on New Haven by Big Lots.

**CM** Thanks for that. Do you ever have any troubles remembering to attend any of your medical appointments or picking up your medications when they're ready at the pharmacy?

**Client** No, I do well at remembering my appointments and to pick up my medications.

### **Oral Health**

**CM** When was the last time you had a dental check-up?

**Client** Maybe a year ago.

**CM** Okay. Which dentist or dental office do you normally go to and, do you have any dental concerns or issues right now, like pain or trouble eating?

**Client** I go to Smile! by the Melbourne mall. No, no current issues, everything is fine.

### **Mental Health**

**CM** Now let's shift to mental health. How have you been feeling emotionally? Have you had any challenges like stress, anxiety, or depression recently?

**Client** I get stressed sometimes but nothing major.

**CM** That's understandable. Have you ever seen a counselor or taken medication for mental health issues in the past?

**Client** No, I haven't needed to.

**CM** Alright, if that ever changes, just let me know and we can find resources for you.

### **Suicide Assessment**

**CM** These next set of questions is standard suicide assessment. We're required to ask all of our clients these questions to assess if there is any current concerns that need to be addressed immediately.

Have you ever attempted to hurt yourself or others?

**Client** No.

**CM** Do you currently have thoughts of hurting yourself or others?

**Client** No.

**CM** Thanks for that. We'll move on to the next section now.

### **Substance Use**

**CM** Some people find it helpful to talk about substance use. Have you used any recreational drugs or alcohol recently?

**Client** I drink sometimes, but nothing else.

**CM** Okay. Do you feel that it is something that you're able to manage well?

**Client** Yeah, I'm fine with it

### **Nutrition**

**CM** How's your appetite been? Are you eating regularly?

**Client** Yeah, I eat pretty well

**CM** That's good to hear. Have you noticed any big changes in your weight recently?

**Client** No, it's been steady.

### **Housing**

**CM** Let's talk about where you're living situation. Do you feel like your housing situation is stable and safe?

**Client** Yes, I'm in an apartment.

**CM** That's a good thing. Are you getting any housing assistance, or do you feel like you need help with housing?

**Client** No, I'm managing okay

**CM** That's great. Now more specifically about your living situation, how long have you been at your current residence?

**Client** I've been in the apartment for 3 years

**CM** And the lease is in your name?

**Client** Mine and my partners, yes.

**CM** Gotcha. So is it just you and your partner living in the apartment? Do you have any children together?

**Client** No, no children. Sometimes I babysit my nieces but no children of our own. It's just us in the apartment.

**CM** Okay just you and your partner. Do you two have any fur babies?

**Client** We've been discussing getting a dog but we haven't gone to look at any yet.

**CM** So no fur babies yet, but possibly soon. Is your partner aware of your HIV status?

**Client** Yes, he's aware and he's on PrEP to reduce the risk of him contracting it.

**CM** I love to hear that! That's great. And would you say that if you become unable to care for yourself, for any reason, that your partner would be able and willing to help you?

**Client** Yes, he would definitely help me until I could do for myself.

**CM** Perfect. Do you happen to know if you have a living will and/or any other advanced directives?

**Client** Nope, I don't believe I have any of that stuff.

**CM** That's okay, most people don't. If you ever change your mind and decide you would like to talk to someone about formalizing a living will or advanced directives, just let me know and I can provide you with resources on where and who to contact.

### **Literacy and Education**

**CM** Do you speak any other languages besides English?

**Client** None fluently. I took Spanish when I was in high school.

**CM** And do you experience any difficulties speaking or writing in English?

**Client** I have difficulties spelling words correctly, I jumble up the letters frequently. Thank god for spell check.

**CM** Spell check saves us all! Have you ever been told by a professional that you have type of learning of cognitive disability or impairment?

**Client** I was on an IEP when I was in school for my dyslexia.

**CM** Thanks for sharing that with me. What's your highest level of education that you've completed?

**Client** I have my Associate's degree.

**CM** Awesome! And do you have any other training or certifications?

**Client** I'm trained in BLS and a certified Medical Assistant.

**CM** That's really cool, I bet being an MA is a really rewarding job.

### **Daily Living Activities**

**CM** How's your daily routine? Are you able to handle things like cooking, cleaning, and getting around okay?

**Client** Yeah, I do all of that myself

**CM** Great. If anything changes and you need help with those tasks, let me know.

### **Social Support**

**CM** Who do you usually turn to for support? Family, friends, or anyone else?

**Client** My brother helps me out when I need it.

**CM** That's great to hear. Do you feel that you have all the support you need, or is there anything missing?

**Client** No, I think I'm good.

### **Insurance and Finances**

**CM** Now I know you have employer sponsored insurance and I already have a copy of the card on file for you but have you had any trouble using it or understanding your benefits?

**Client** Not really, but it's a little confusing sometimes

**CM** If you'd like, I can help you with that or connect you to someone who can explain it more clearly

### **Sexual History and Risk Assessment**

**CM** Can we take a moment to talk about your sexual health? It's important for making sure we're covering all aspects of your care. Are you comfortable with that?

**Client** I guess so

**CM** Thanks. Are you currently sexually active?

**Client** Yes

**CM** I know you already said your partner is on PrEP to prevent him from contracting HIV, are there any other safer sex methods that you use?

**Client** We use condoms occasionally, but not always.

**CM** Great. And I know you've previously said that you consume alcohol. Are you ever having sex while under the influence of alcohol?

**Client** Sometimes, but not frequently at all.

**CM** Alright, and do you every use any hypodermic needles or have you gotten any tattoos/piercings that weren't at a licensed parlor?

**Client** My bestfriend gave me my bellybutton piercing when we were in high school but that's the only needle use.

**CM** Thanks for sharing that with me. Were there any adverse reactions to getting that piercing from your friend?

**Client** Yeah, it got really infected shortly after she pierced it and I had to take out the piercing and be put on a round of antibiotics.

**CM** Ouch, I'm so sorry that happened to you but I appreciate your sharing that with me.

### **Legal Issues**

**CM** Have you had any legal issues recently, like dealing with court, housing disputes or immigration concerns?

**Client** No, nothing like that.

**CM** That's good to hear. If something ever comes up, let me know – we can connect you with resources

### **Closing the Assessment**

**CM** Thank you so much for sharing all of this with me today. It really helps me understand how I can best support you. Is there anything else you'd like to talk about or any concerns I didn't ask about?

**Client** No, I think we covered everything

**CM** Great. I'll follow up on a few things we talked about, and we'll check in again soon. In the meantime, if you need anything, don't hesitate to reach out.