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A Resource Center for Today's Case Manager

Finding your Voice: Advocating for clients during a pandemic



Nancy Freeborne, DrPH, MPH, PA-C
Chief Executive Officer
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MaryBeth Kurland, CAE
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Commission for Case Manager Certification

Agenda

- Welcome and Introductions:
 - Commission for Case Manager Certification

- Presentation:
 - **Nancy Freeborne, DrPH, MPH, PA-C, Chief Executive Officer of Freeborne Health Advising (FHA)**

- Question and Answer Session



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Learning Outcomes

After the webinar, participants will be able to:

- Discuss ethical principles relating to advocating for clients.
- Identify safety issues requiring immediate action.
- Describe best practice advocacy techniques.
- List common medications which need evaluation by providers.





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Nancy Freeborne, PA-C, MPH, DrPH

Freeborne Health Advising

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Ethical Principles related to Advocacy

- Non-maleficence: “First, do no harm” (Hippocrates, in *Of the Epidemics*):
 - Example situations:
 - General: Risk/benefit calculations
 - In pandemic: What is harm?
Intubation?



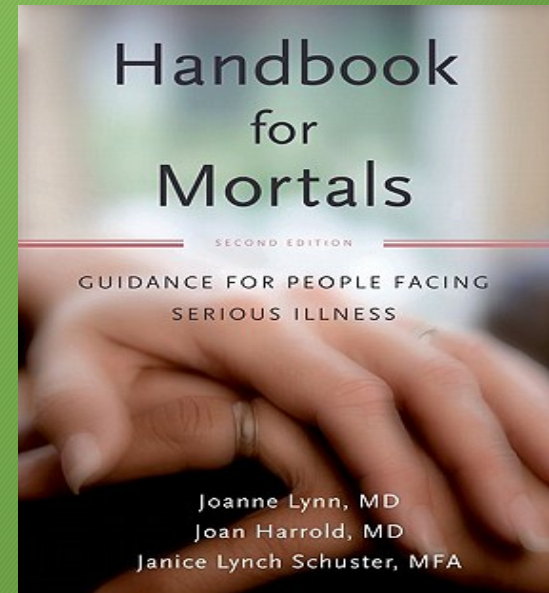
Ethical Principles related to Advocacy

- Autonomy:
 - Example situations:
 - General:
 - Frail client with movement disorder
 - In pandemic and with other infectious disease:
 - Risk of transmission
 - Pro/con of treatment
 - Delirium, fatigue common with COVID

<https://khn.org/news/seniors-with-covid-19-show-unusual-symptoms-doctors-say/>

Ethical Principles related to Advocacy

- Beneficence (promoting and achieving good):
 - Example situations:
 - General: Nutrition, reflective exercises, comfort
 - In pandemic: Discussions about death



Ethical Principles related to Advocacy

- Justice:
 - Example situations:
 - General: Calm communication, preferences
 - In pandemic: File of Life/COVID prep for first responders: http://www.folife.org/wp-content/uploads/UPDATE_FOL_COVID19.pdf



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Ethical Principles related to Advocacy

- Confidentiality (prudence):
 - Example situations:
 - General: Check with patient about their preferences
 - In pandemic: Is confidentiality as important?



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How to Address Ethical Dilemmas?

- Do No Harm: family collaboration, ask for examples, multiple decision points
- Autonomy: repeat statements three times, have client repeat back to you
- Beneficence: What is best “good” of the day?
- Justice: Support of wishes, communication with payers, advocacy to minimize disparities
- Confidentiality: common sense-think of your own family

Ethical Principles related to Advocacy

- Resources:

- Huycke, L. and All, A.C. (2000), Quality in health care and ethical principles. *Journal of Advanced Nursing*, 32: 562-571. doi:[10.1046/j.1365-2648.2000.01540.x](https://doi.org/10.1046/j.1365-2648.2000.01540.x)
- Tahan HM. Essentials of Advocacy in Case Management: Part 1: Ethical Underpinnings of Advocacy-Theories, Principles, and Concepts. *Professional case management*. 2016;21(4):163-179. doi:10.1097/NCM.000000000000162.
- Tahan HM. Essentials of Advocacy in Case Management: Part 2: Client Advocacy Model and Case Manager's Advocacy Strategies and Competencies. *Professional case management*. 2016;21(5):217-232. doi:10.1097/NCM.000000000000163.

Institute of Medicine

- Six aims for improving healthcare for clients:
 - **Safety**
 - Effectiveness
 - **Client-centeredness**
 - Timeliness
 - Effectiveness
 - **Equity**
- <http://www.ihl.org/resources/Pages/ImprovementStories/AcrosstheChasmSixAimsforChangingtheHealthCareSystem.aspx>

Advocating for Safety



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- During the pandemic?
 - Freedom?
 - How much oversight?
- Falls
 - Coaching
 - Communication techniques

Advocating for Safety

- Nutrition
 - Coaching
 - Communication techniques
- Dementia



Image by [Mark Martins](#) from [Pixabay](#)

Advocating for Safety with Medicines

- Pill boxes-often crucial
 - But, question the meds
 - Double check prescriptions are not prn
- Titering medicines
 - Ex. Half doses

Advocating for Safety with Medicines

De-prescribing:

- 1st generation antihistamines such as diphenhydramine
- Anti-spasmodics
- Tri-cyclic anti-depressants
- Benzodiazepines

De-prescribing:

- Muscle relaxants
- Anti-psychotics
- Alpha 1 blocker
- oxybutynin hydrochloride
- Herbal products
- Anti-coagulants-good, but risky

<https://www.nia.nih.gov/health/safe-use-medicines-older-adults>

Techniques for Advocacy

- Client-centeredness:
 - Active listening
 - Motivational interviewing
 - Empathy
 - Full engagement
 - Active advocacy



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Techniques for Advocacy

- Case Managers Technical skills and attitudes acquisition:
 - Certification
 - Life-long learning
 - Practice
 - Self awareness



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Advocating for equity

Nationally

- AARP
- Congress
- American Society on Aging
- National Center on Elder Abuse
- National Council on Aging
- National Hispanic Council on Aging

State, County

- Area Agency on Aging
- Aging and Disability Resource Centers

Techniques for Advocacy

- Stages of Engagement:
 - Raising awareness
 - Doing for
 - Counseling
 - Doing together
 - Coaching
 - Doing independently
 - Mastery/Maintenance

Tahan HM. Essentials of Advocacy in Case Management: Part 2: Client Advocacy Model and Case Manager's Advocacy Strategies and Competencies. *Professional case management*. 2016;21(5):217-232. doi:10.1097/NCM.000000000000163

Case Study # 1: Fred



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- Beneficence:
 - Comfort
 - Medicine management
 - Big picture advocacy- insurance, county and other resources

Case Study # 2: Charlie

- Confidentiality:
 - Ex. New diagnosis
 - What are your limits as a case manager?



Image by [Mohamed Hassan](#) from [Pixabay](#)

Case Study # 3: Nelda and John



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- Autonomy:
 - Choices?
 - Knowledge is power
 - Risk/benefit

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Question and Answer



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Thank you!

Commission for Case Manager Certification

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