

Close-Out Session: Completing the Work

Approximately: 1.5–2 hours

Session Five Activities:

- A. Review the transition process for clients linked to medical care.
- B. Review the transition process for clients not yet linked to medical care.
- C. Transition to long-term / Ryan White case manager or other providers.

Close-Out Session Guide Agenda

5A. Review the Transition Process: Linked Clients

5B. Review the Transition Process: Non-Linked Clients

5C. Transition to Long-Term / Ryan White Case Manager (CM) or Other Case Management Services

Forms and Documents Needed for Close-Out Session:

- *ARTAS Session Plan*
- *Resource directory*
- *Contact information for long-term / Ryan White CM and agency*
- *Paperwork for long-term / Ryan White CM*
- *Session Notes*
- *Session Notes Summary Sheet*
- *Case Review Form*
- *Client Satisfaction Questionnaire*

(Note: For the Close-Out Session, you do not conduct all three agenda items for each client.)

For clients linked to medical care, conduct agenda items 5A and 5C.

For clients who have not linked to medical care (non-linked clients), conduct agenda items 5B and 5C.

Remember: The sessions are client-driven. As such, **the agenda, time, content, and forms must be adjusted to the client's needs.**

5A: Review the Transition Process: Linked Clients

Purpose: To review the client's progress made during ARTAS and discuss the client's visit with the medical provider.

Forms and Documents: *ARTAS Session Plan*
Resource directory

- *List of medical providers*
- *List of community service providers (e.g., substance abuse, mental health, housing, food, and insurance)*

Advanced Preparation:

- Review the client's ARTAS Session Plan, if one was developed in a previous session.

Key Considerations:

Remember that the client:

- May not be ready to transition from ARTAS and/or end your relationship.

Procedure:

For all clients:

1. Welcome the client back for the last session and congratulate them on following up successfully with today's session. Recognize the many demands the client has and state how much you appreciate them taking time to meet with you.
2. Ask the client what questions, concerns, or new insights they have as a result of the previous session(s).
3. Summarize any additional points made during the discussion.

For clients who have decided to link to medical care but have not yet attended their appointment:

4. Review the outcomes of all activities listed on the ARTAS Session Plan for both you and the client. If necessary, revise the plan.
5. Ask the client about any new barriers and/or strengths discovered as a result of completing the ARTAS Session Plan activities. If necessary, revise the plan.
6. **This is a new step added to the Close-Out Session.** Discuss how the client can continue to use this plan to achieve their goals and objectives after ARTAS.
7. **This is a new step added to the Close-Out Session.** Complete the steps listed under 4F: Schedule Medical Appointment and/or Next Session. Then, skip to step 9 in this section.

For clients who attended a medical appointment:

8. Discuss the client's appointment with the medical provider, including their reactions and any questions they may have. Review with the client what happened during the medical visit and ask what the client thought went well and what could be improved.
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For all clients:

- a. Discuss the barriers that the client identified and overcame during ARTAS. Review strategies that they identified as successful. Point out any additional strategies that you noticed that they may not have noted.
- b. Discuss any remaining barriers that could interfere with the client attending their next medical appointment or linking to other support services. Strategize with the client to identify ways that they can overcome these. If there are items in the ARTAS Session Plan that the client has yet to complete, obtain a commitment from them that they will continue to work on these.
- c. Ask the client what questions, concerns, or insights they have now that they have completed the intervention. Address any additional issues that arise.
- d. Encourage self-help through HIV support groups and linkage to long-term social services. Review the community resources discussed during earlier sessions. Also review the important role the client's family, friends, social groups, and other informal networks can play in supporting their continued use of medical care and other services. Provide verbal and written information regarding community services available.
- e. Next step, skip to 5C: Transition to Long-Term / Ryan White CM or Other Providers.

5B: Review the Transition Process: Non-linked Clients

Purpose: To review the client's progress made during ARTAS and discuss how the client will link to medical care.

Forms and Documents: *ARTAS Session Plan*
Resource directory

- *List of medical providers*
- *List of community service providers (e.g., substance abuse, mental health, housing, food, and insurance)*
- *Paperwork for long-term / Ryan White case management*

Advanced Preparation:

- Review the client's ARTAS Session Plan, if one was developed in the previous

session.

Key Considerations:

Remember that the client:

- May not be ready to transition from ARTAS and/or end your relationship.
- May feel discouraged or that they have failed by not linking to medical care during ARTAS.

Procedure:

For all non-linked clients:

1. Welcome the client back for the last session and congratulate them on following up successfully with today's session. Recognize the many demands the client has and state how much you appreciate them taking time to meet with you.
2. Ask the client what questions, concerns, or new insights they have as a result of the previous session(s). You may also want to ask about how the client's thoughts about linking to medical care may have evolved since your last session. In addition, you may ask about any reactions they have to ARTAS's focus on strengths.
3. Summarize any additional points made during the discussion.
4. Using the ARTAS Session Plan, review the client's progress over the course of the intervention. Discuss the client's strengths and how they used these to complete the tasks listed in their plan. Emphasize the client's accomplishments during ARTAS.
5. Discuss the barriers that the client identified and overcame during ARTAS. Review strategies that they identify as being successful. Point out any additional strategies that you have noticed they may not have noted.
6. Discuss the client's hesitance to link to medical care. Review the psychological and/or physical barriers that are preventing the client from accessing medical care. Discuss with the client how they can overcome these barriers. If the client desires, revise the ARTAS Session Plan to reflect concrete steps they can take, post-ARTAS, to link to medical care.
7. Remind the client about the benefits of early entry into medical care. Provide them with contact information for community medical providers and promote the client's independent contact with the clinic. Offer them the opportunity to call you one additional time following their independent clinic visit.
8. Ask the client what questions, concerns, or insights they have now that they have completed the intervention. Address any additional issues that arise.

9. Encourage self-help and linkage to medical and long-term social services. Review the community resources discussed during earlier sessions. Also review the important role the client's family, friends, social groups, and other informal networks can play in supporting their linkage to medical care and other services. Provide verbal and written information regarding other community services available.
10. Next step, continue to 5C: Transition to Long-Term / Ryan White CM or Other Providers.

5C: Transition to Long-Term / Ryan White CM or Other Case Management Services

Purpose: Explain to client the purpose of long-term / Ryan White case management services and how they differ from ARTAS. Facilitate the transition to the new CM.

Forms and Documents: *Contact information for long-term / Ryan White CM*
Session Notes
Session Notes Summary Sheet
Case Review Form
Client Satisfaction Questionnaire

Advanced Preparation:

- Ask the new long-term / Ryan White CM to be available during the client session so they can meet the client.
- Bring the name and contact information of the long-term / Ryan White CM.

Key Considerations:

Remember:

- The client may be unsure about what to expect from long-term / Ryan White case management.
- The client may be hesitant to connect with a new CM.
- Ask the long-term / Ryan White CM to join the session, if the client agrees.

Procedure:

For all clients:

1. Explain what the client can and cannot expect from long-term / Ryan White case management and how it differs from ARTAS, as follows:
 - While ARTAS focuses mainly on overcoming short-term barriers to linking to medical care, the long-term / Ryan White CM can work with the client on more general issues such as housing, employment, and other treatment needs.
 - The relationship with the long-term / Ryan White CM will not be as intensive as their relationship with you. As a result, the CM may not be able to accompany the client to appointments.

- The relationship between the client and long-term / Ryan White CM will not be restricted to 90 days or five sessions.
 - The client will still be expected to actively participate in their care.
2. Emphasize how the client can use the strengths identified during their participation in ARTAS to overcome barriers to services provided by the new CM. Validate the client's concerns by saying, *"This kind of case management is different and you won't be working with me. But you can have a similar working relationship with your new CM."*
 3. Answer any questions and address any concerns the client has about this new form of case management.
 4. Ask the client if they would be open to having the long-term / Ryan White CM join the session, if they are available. (Note: Plan in advance with the new CM and ensure they are available.)
 - a. **If the client would like to meet the new CM**, then bring them into the session and introduce them to each other. Ask the client to tell their story and share the work they have done in ARTAS and the strengths they have identified. Ask the client to discuss the barriers that they identified through ARTAS and what they have done to overcome them. Review any other barriers to accessing medical care or support services that will need to be addressed. Discuss any other issues that have arisen during ARTAS that the client will need to address during long-term / Ryan White case management.
 - b. **If the client is not comfortable having the long-term / Ryan White CM join the session**, then discuss their reluctance. Discuss how the client will access case management on their own and how they can overcome barriers or discomfort associated with doing so. Review the benefits of case management and what the client can gain from participating. Provide the client with the contact information for their long-term / Ryan White CM, and ask their permission to give their contact information to the new CM.
 5. Complete all paperwork necessary to transfer the client to another agency and/or CM, if this is in the memorandum of agreement between your agency and community partner. This could include discharge forms for your agency, intake/referral forms for the partner agency, and updates on client progress/status.
 6. Thank the client for coming and congratulate them on completing the intervention and working with you. Remind the client that linking to medical care is important to their overall health, and that you hope they use the skills you talked about to obtain services needed so they can access medical care and treatment.
 7. End the session by asking the client to complete the **Client Satisfaction**

Questionnaire on **page 130** in the Session Forms section.

8. Next step, end the session and complete paperwork:
 - Depending on your agency's procedures and/or schedule for the day, you may want to take a few minutes to complete all the required paperwork before moving on to the next client and/or task. Recommended paperwork to complete includes:
 - Session Notes
 - Session Notes Summary Sheet (if the client dropped out)
 - Case Review Form