2019

Boundaries in CSS Intensive Case Management

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Boundaries and General Interactions with Clients

A central part of your role as an Intensive Case Manager within the CSS program involves interacting with your clients in a respectful and professional manner. It is important to know what the boundaries of your job entail around communicating and interacting with your clients. Keep in mind that you, the intensive case manager, are always charged with the responsibility for establishing and maintaining boundaries with your clients, and that this is never your client's responsibility.[1]

Accepting gifts

Boundary issues can quickly emerge when CSS staff and clients engage in intimate gestures such as gift giving/exchange and sharing food.

Often, CSS clients will graciously offer caseworkers food and drinks during home visits. This, of course, is not expected of clients, however in many cultures these gestures are seen as a sign of friendship and mutual respect; an appreciative gesture. It is up to the CSS staff to decide to accept food or drinks from any CSS client; conversely, this is not expected of caseworkers. Caseworkers may refuse food or drink from clients. However, CSS acknowledges that sharing food and drink with CSS clients builds trust and rapport and therefor may be difficult to refuse.

For CSS staff who do not wish to accept food or drink from their clients, it may be useful to try some of the following:

> -Clearly outline the Client Charter with the client, letting them know there are no expectations for either clients to offer food/drink/gifts or for CSS staff to accept these offerings. Inform the client these boundaries are in place in the interest of time management as well as fair and equal service provision.

> -Do not schedule home visits during meal times.

> -Meet clients in the community instead of at home.

> -If a client offers you food, inform the client you've just eaten but would be happy to bring the food back to your agency.

Regarding the acceptance of gifts, CSS staff should refer to their agency's internal operating manuals for guidance on policies related to accepting gifts. Staff should also use their own judgement when deciding if a particular gift from a client is appropriate. In many instances, a client's gift represents nothing more than an appreciative gesture. In some instances, however, a client's gift may carry great meaning and monetary value. It is incumbent on the CSS staff to consider carefully the significance of any client's gift.

General conduct and service provision to clients

It is fine to socialize with your clients, however CSS staff are reminded to maintain a goal-oriented relationship with all clients.

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[1] It is also important to note that all boundaries outlined in this document are subject to the caseworker's respective agency's internal organizational policies and guidelines.

Friendships with current CSS clients constitute an inappropriate relationship.

If a CSS staff begins to feel that a client of theirs requires too many emotional resources, they should talk with their supervisor about this.

CSS clients may sometimes ask CSS staff to help their extended family members, friends or relatives. Case workers/ case managers/ settlement staff are reminded that their role is to work with their client *only*, not extended family members.

Maintain the same professional boundaries with the client's family and friends as with the client.

CSS staff should not engage in physical contact with their clients if there is a possibility of psychological harm to the client as a result of the contact. CSS staff who do engage in appropriate physical contact with clients are responsible for setting clear, appropriate and culturally sensitive boundaries *in advance* that govern such physical contact.

Encounters in the community

Encountering clients in the community while not working will inevitably happen. If you encounters a CSS client in the community/in their personal life during off-work hours, and the client insists to talk about their 'case', be honest and upfront and inform them the topic may be discussed another time. You may want to take the time to explain to your client you are both a CSS staff and a member of the community, but that you cannot be both at the same time.

If you encounter a client in the community who has requested your help, you should follow up with the client once back at the office and inform your direct Supervisor/Manager afterwards.

If you meet a client in the community and the client is in crisis, you should respond immediately to the emergency by getting the appropriate help.

Social media

Social media can be a useful communication tool that connects members and staff of the CSS program with other staff, volunteers, and communities at large. As social media evolves and becomes more embedded within the workplace, it is necessary that you are proactive in your responsibilities on such platforms.

The following provides a (very short) set of guidelines for professional social media usage to assist you with successfully and responsibly setting boundaries when using technology and social media to interact with clients.[2]

- Do not disclose confidential information related to past, present or future employees, volunteers, members, clients, guests, funders, or other persons conducting business with the CSS program on your social media platforms.

- CSS staff should protect their social networks, and keep their personal information private. It is recommended that they adjust the privacy settings on their social media accounts to limit access to their personal information by clients or anyone they do not know.

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[2] These guidelines are subject to staff's own organizational policies and guidelines on social media use.

- CSS staff should use their professional judgment, seek information from other sectors, review best practice guidelines and risk management strategies, and engage in on-going dialogue with their colleagues and supervisors. Refer to your own organization's policies and guidelines on social media use for further information.

Self-disclosure

There are times when "self-disclosure" or sharing some personal information with clients can be helpful. Self-disclosure can be used to promote interaction and involvement with your clients. However, before self-disclosing any information to CSS clients, it is important to pose the following questions:

- 'Is this story beneficial for the client, or my own ego?' If you know talking about yourself is better for you than the client, don't do it.

-Motivation. Think critically about why are you sharing this information with the client?

-Appropriateness. Think about if this information is something that should be shared? Will the sharing deepen the professional relationship with your client?

-Disclosure should not relate to deeply intimate personal topics. Disclose a limited amount of information about yourself only after it is professionally determined it may help to meet the therapeutic needs of the client.

Romantic Relationships

Romantic relationships with current CSS clients are inappropriate and not permitted.

As such, CSS staff are prohibited from engaging in sexual activities or sexual contact with CSS clients, clients' relatives, or other individuals with whom clients maintain a close personal relationship.

CSS staff should not provide CSS services to individuals with whom they have had a prior sexual relationship. *Providing services to a former sexual partner has the potential to be harmful to the individual and is likely to make it difficult for the CSS staff and individual to maintain appropriate professional boundaries.*[3] Please refer to your local organization's policies for further details on romantic and sexual relationships.

Conclusions, Interactions with Clients

A good rule of thumb for determining if any interaction or relationship with a client is inappropriate is considering the following:

1. Does the interaction or relationship interfere with your ability to exercise professional discretion?

2. Does the interaction or relationship interfere with your ability to exercise impartial judgement?

3. Does the interaction or relationship exploit your client to further your own personal interests?

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[3] NASW, 2000, Standard 1.09 [d]

4. Does the interaction or relationship harm your client in any way?

5. Ask yourself, am I the best person to deal with this situation?

BOUNDARIES AND DRIVING

The provision of transportation by CSS sites allows CSS clients to combat social isolation as they access much needed services that may be inaccessible or hardly accessible by public transit.

Most CSS sites, however, do not drive CSS clients and strictly forbid clients in personal vehicles. Instead, tickets for public transit (and in the case of emergencies, taxi vouchers) are provided.

At select sites, CSS caseworkers may be provided the choice to drive clients. This is at the case worker's own discretion, cost, and insurance premiums.

CSS sites in smaller communities with less public transit available may choose to employ agency vans which transport clients. CSS staff should often remind clients that agency vans are shared which may limit the ability to transport clients back and forth to various places and on multiple occasions.

BOUNDARIES AND CHILDCARE

Childcare is hard to come by for GARs as it is both expensive and wait lists for enrollment are long.

CSS staff are never expected to take care of their client's children while in their care. However, where this is unavoidable and children are in the room with their parents, CSS staff have found it a best practise to find teaching and learning moments for parents and children in order to incorporate a young person's presence.

CSS sites rely heavily on volunteers to ease the burden of childcare from staff. Volunteer coordinators recruit volunteers dedicated to childcare (they do not need to be ECE certified but do require a police record clearance letter) to provide on-site childcare services.

Sites that do provide child minding must make it clear to their clients that childcare is only for appointments where parents have appointments in the same building. Parents may not leave children at child minding and attend appointments off-site.

CSS staff should remind parents to pick-up children in a timely manner between the hours when child minding is running.

BOUNDARIES AND CELLPHONES

The availability of work cell phones varies by CSS site and budgets. That is to say, not all CSS staff will have access to a work cell phone. Some CSS staff will use their personal phones and be provided with a work phone allowance (e.g. CAD $50/month). Other CSS staff have neither option available to them.

At CSS sites where work cell phones (or allowances) are provided, staff are instructed to turn off their phones to clients at the end of day. Phones should be on and in working order throughout the work day. Upon meeting clients, CSS staff should explain that they will answer their phone during working hours only (including responding to texts and social media) and that any form of communication outside of these specific timelines will not be answered. CSS staff will return all calls/texts within 24-48 hours. Clients are informed that they may call or text in their first language.

BOUNDARIES, EMERGENCY SITUATIONS AND WORKING AFTER HOURS

CSS staff are instructed to turn off their phones after working hours, informing their clients to call 911 in the event of an emergency. CSS staff are expected to educate clients about what qualifies as a 911 emergency.

In the event that a CSS client is experiencing a crisis after hours that is not a 911 emergency, emergency crisis lines and mobile crisis support units can offer assistance. It is helpful for you to inform your CSS clients, in advance, that these services are available (and where) in their community for support.

Some CSS sites allow staff to work after hours in the event of a client emergency, however this is at the choosing of the manager. The CSS staff is to seek Management approval when requesting to work after-hours. Staff safety should always be ensured.[4]

BOUNDARIES AND INTERPRETERS

It is advisable that all interpreters used by the CSS program have undertaken some form of formal interpretation training, specifically training around setting boundaries and conducting professional relationships with clients.

Interpreters must sign the same confidential forms that CSS staff sign. CSS staff should review the importance of confidentiality with interpreters on a regular basis as interpreters are often of the same socio-cultural group.

When a client does not want an interpreter from the same social or cultural group and there is such an interpreter available to meet this request, the CSS staff should do their best to honour this ask.

BOUNDARIES, CONFIDENTIALITY, PRIVACY, AND INFORMATION SHARING

Confidentiality ensures your client understands that although the information they share with a CSS program staff member is private and confidential, there are instances where the staff member has a duty

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[4] Please refer to your organizational policies which supersede the boundaries policies outlined in this document.

to disclose. Before collecting any information from a client, CSS staff must make sure to inform the client of the conditions under which confidentiality cannot be guaranteed:

- If the client discloses information that suggests they are at risk of harming themselves or someone else

- If the client discloses information concerning abuse or neglect of a child (confirm the legal age of a child applicable in your province)

- If the client signs a consent giving permission for you to share information

- If the client's file is subpoenaed in a court of law

CSS clients must sign a CSS Client Charter and the signed copy is to be placed in the client file. The CSS Client Charter is a document that clearly outlines to all CSS clients the types of services that will be delivered in the program, clients' rights and responsibilities as CSS service users, as well as what is expected of CSS staff providing case management services.

CSS staff should offer clients choices and boundaries as regards to sharing information. CSS clients are advised that it is their choice about how much personal information they share with their assigned CSS staff person. Remember that your clients are competent and have agency, and are not passive recipients of the service.

CSS staff should introduce and explain the CSS Consent and Confidentiality form upon commencing work with CSS clients. This form outlines the use of client information. Interpreters must sign the same confidential forms that CSS staff sign. CSS staff should review the importance of confidentiality with interpreters on a regular basis as interpreters are often of the same socio-cultural group.

When doing Intake or conducting assessments, CSS staff should regularly explain to their clients why they are asking them certain sets of questions.

CSS staff are advised to set boundaries and limits with clients who regularly overshare information. Gently inform the client they are sharing too much and that you do not need to know all the details. However, if a client is oversharing because they are in crisis, let the client talk, then refer them to a professional who will be better equipped to support them. Recognize your own limits and make referrals when needed.

CSS staff have access to privileged and confidential information, and are never to use this information to the disadvantage of clients or to their own personal advantage.

Case workers should never act as representatives for clients under powers of attorney or representation agreements.

Boundaries and Setting Client Expectations

Clearly informing CSS clients of the goal of the CSS program and the role of the CSS staff (outlining responsibilities including constraints and limitations) is a required first step in setting client expectations. Introducing the Client Charter at the onset of service is a best practise for beginning this conversation.

When first meeting clients, ensure clients fully understand CSS explanations and know what to expect from the CSS program.

Whether services are provided at a CSS site by appointment-only or via drop-in hours, this should clearly be communicated to clients to avoid service dissatisfaction. Some CSS sites have found it helpful to offer drop-in hours a couple of days per week for CSS clients that require assistance but whose CSS staff person cannot provide an immediate appointment. This practise has been found to assist in managing client expectations of the program.

CSS staff should inform clients that boundaries will change over time, i.e. as clients become more self-sufficient, the role of CSS staff will become less intensive.