

How to Begin—Determining a Client’s Need

Webinar Follow-up Activity Facilitator Instructions

Purpose

These instructions can be used by a clinic manager, supervisor, trainer or facilitator to conduct a follow-up activity with staff who attended the webinar, “How to Begin—Determining a Client’s Need” or who viewed the [archived recording](#) on the fpntc.org website. The purpose of this activity is to help staff practice and improve their skills in using “transitional” and “confirming” statements to assess a client’s need for additional services.

Who Should Attend

This activity is appropriate for any clinic staff who assess clients’ needs for services.

Objectives

By the end of this activity participants will be able to:

- Transition from addressing a client’s stated need to exploring the need for additional family planning and related preventive health services.

Preparation

Make one copy of the Clinical Pathway handout for each participant. Make enough copies of the role play scenarios so each person has the opportunity to be the counselor at least twice.

Instructions

1. Introduce the activity by saying:
This activity will give you a chance to practice offering additional needed services to your clients, beyond their originally stated reason for their visit. I’m going to distribute some role plays for you to practice in pairs, and then we’ll discuss them as a group.
2. Give each participant a copy of the handout “Clinical Pathway” for their reference. It can serve as a reminder of the family planning services available to your clients, whether they are at your site or offered through a referral.

Time Needed

1 hour

Materials Needed

Handout “[Clinical Pathway](#)”

Role play scenarios:

“Information for Counselor” (Part 1 and 2) and “Information for Client” (Part 1 and 2)

3. Instruct participants to pair up. Distribute to each pair information for the person playing the “Role of the Counselor Part 1” and the “Role of the Client Part 1.”
4. Instruct participants to carefully read the information that was provided and begin the role play session.
5. When everyone has completed the role play, you may choose to have staff process the role play first in pairs, or only process within the larger group.

Possible processing questions:

- *Is anyone willing to share their own experience doing the activity? Any surprises?*
 - *What services were most challenging or awkward to bring up for the counselors?*
 - *From the client’s perspective, what did your counselor do to help you feel comfortable discussing the potential need for additional services?*
 - *What would the counselors, do differently next time?*
6. Distribute to each pair information for the person playing the “Role of the Counselor Part 2” and the “Role of the Client Part 2.” Ask them to continue the role play with the new information. Process the role plays in the large group.

Wrap Up

In a circle, one-by-one, ask each participant to share something they plan to do to help them become more comfortable broadening the scope of services they offer.

Stress the following points:

- Always keep in mind the needs and circumstances of each individual client.
- You don’t need to offer every client every service in the Clinical Pathway.
- Follow the recommendations in the QFP.
- Actively listen, ask open-ended questions and be client-centered.
- The services you are offering are to improve their overall health and well-being, regardless of their pregnancy intention.

Information for Person Playing **The Role of the Counselor (Part 1)**

Client: 21 year old female

Reason for visit: Dissatisfied with current birth control method

Focus of role play:

Address client's primary concern but also...

- Practice asking about source of primary health care
- Practice bringing up the topic of a reproductive life plan

Reminders:

- 1) Establish rapport
- 2) Explain confidentiality and mandated reporting
- 3) Confirm or ask about reason for visit
- 4) Does your client have another **source of primary health care?**

Sample transitional statement: *"We provide a broad range of services here—which we can offer if you don't already get these services somewhere else. Do you get health services anywhere else?"* (Offer other services or refer to the clinician as appropriate, and after client's stated needs have been met.)

- 5) **Discuss reproductive life plan.** This discussion should help guide your conversation about what contraceptive method she thinks might work best for her.

Sample transitional statement: *"I'd like to ask you some questions, some of which may feel personal, however we ask these questions of all our clients to help them choose the best method for themselves and to help us provide quality, preventive health care."*

Possible reproductive life planning questions:

"Do you have any children now?"

"What are your thoughts about having children in the future?"

- 6) Have an interactive discussion about method options

Information for Person Playing **The Role of the Client (Part 1)**

Information the counselor has about you:

Client: 21 year old female

Reason for visit: Dissatisfied with current birth control method

More details about you:

You have been using the pill for 7 months but sometimes forget to take it. You have not gotten pregnant but you know that the pill is perhaps not the most effective method for you because of your difficulty remembering. You want to have children someday, but not for at least 5 or more years. You do not have another source of primary care.

Information for Person Playing The Role of the Counselor (Part 2)

Client: 21 year old female

Reason for visit: Dissatisfied with current birth control method

Focus of role play:

Address client's primary concern but also...

- Assess the need for a pregnancy testing services and emergency contraception
- Assess the need for STD services

What you have learned so far during the visit:

- Client has been using the pill for 7 months but sometimes forgets to take it. She wants to explore methods that may be more effective for her.
- She wants to have children someday, but not for at least 5 or more years.
- She has decided to try a hormonal IUD.
- She does not have another source of primary care.

Reminders:

- 1) Assess the need for a pregnancy test. Offer emergency contraception if appropriate.

Sample transitional statement: *“Because you told me you haven’t been consistently taking your birth control pill, I’d like to ask you some questions to help you decide if you should get a pregnancy test.”*

Possible pregnancy test assessment questions: (interactive discussion with client)

“When was the first day of your last period? Tell me more about your birth control pill use recently. Have you been remembering to take it since your last period or has there been a day or days when you’ve missed taking it? Have you had intercourse during this time?” (Offer and educate about emergency contraception if appropriate.)

- 2) Assess for the need for STD services by conducting a sexual risk assessment.

Sample transitional statement: *“I’d also like to ask you some questions about your sexual health. They may feel like very personal questions, but again, know that we ask all our clients these questions so that we can provide the best care possible.”*

[See the QFP, p. 9 Box 4. Steps in conducting a sexual health assessment](#)

(the 5 P’s: Practices, Pregnancy Prevention, Partners, Protection from STDs, Past STD history)

- 3) Discuss and encourage condom use (assess need for condom demonstration)

Information for Person Playing **The Role of the Client (Part 2)**

Information the counselor has about you:

Client: 21 year old female

Reason for visit: Dissatisfied with current birth control method

What the counselor has learned about you so far:

You have been using the pill for 7 months but sometimes forget to take it. You have not gotten pregnant but you know that the pill is perhaps not the most effective method for you because of your difficulty remembering. You want to have children someday, but not for at least 5 or more years. After discussing your reproductive life plan and discussing contraceptive options, you have decided to try a hormonal IUD. You do not have another source of primary care.

Additional information about you:

You have been dating one person for about 3 months but have not agreed to be exclusive yet, so you're not sure if he's dating anyone else. Before you started dating him, you were dating another man for about 6 months, and also having casual sex with a bisexual woman.

Role Play Options

Possible additional scenarios:

Client: Male/female couple who use a less effective method of birth control such as fertility awareness method

Reason for visit: Wellness exam

Additional services to offer: Preconception counseling for both female and male

Client: 17 year old female

Reason for visit: STD test

Additional services to offer: Pregnancy testing and contraceptive services

Client: 45 year old female with no other source of primary care

Reason for visit: Irregular bleeding

Additional services to offer: Related preventive health services based on clinical recommendations

1) Other related preventive health services include:

- genetic counseling and evaluation for BRCA testing (Grade B)
- cervical cancer screening
- clinical breast exam
- mammography

2) If you are not a licensed clinical staff person, you might say something like:

“As I mentioned at the beginning of your visit, we offer a broad range of services and the provider that you’re about to see can discuss some of these services with you to see if it would be appropriate for you to receive any of them.”

Clinical Pathway

For family planning services for women and men of reproductive age

