

QSP CLIENT GUIDE

Client Information

Name:

Date:

Age:

Diagnosis (if any):

Case Manager:

Things You Should Consider Before You Take on a Client

Q1. What are the person's primary needs and areas where they need assistance?

Q2. What does a typical day look like for them?

Q3. What are their routines and preferences?

Q4. Are there behaviors or situations that may be challenging? Does this person have specific triggers?

Q5. Are there physical disabilities, mental illness, or trauma-related conditions that I should be aware of?

Q6. Are there cultural, religious, or household practices I should respect?

Q7. Is there a person-centered plan that I should review?

Q8. What are their expectations of me or what services will I be providing?

Q9. Does this person take any medication? If so, what is the prescription, dosage, and time it should be taken?

Q10. Are there any safety concerns?

Q11. Do they have any interests, hobbies, or places they like to go?

Q12. Do they need assistance managing money or budgeting?

Q13. Do they have any dietary restrictions?

Q14. What are the days and time of services needed? What would the required schedule be?

Ask Yourself:

- ☐ Do I have the skills needed to safely meet this person's needs?
- ☐ Do I have the training required for their needs?
- ☐ Am I comfortable performing all services that are expected of me?
- ☐ Do I understand this person's plan and know who to contact for further questions or concerns?

Things to Consider and Review:

- ☐ The scope and limits of your role
- ☐ What training is required or would be helpful
- ☐ What to do during a crisis or emergency
- ☐ How to document and report concerns
- ☐ How to maintain professional boundaries
- ☐ Services required
- ☐ Who do I contact when they need help
- ☐ When is a situation beyond my training or ability

