

2015

BEREAVEMENT SERVICES STEPS



By Monica Do Coutto Monni

How to Operate a Bereavement and Grief Program

1/1/2015



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NNPCN BEREAVEMENT SERVICES STEPS

IMPORTANT: Complex-grief high-risk clients can happen at any step, from the moment of first contact with the office to the moment of client discharge. Some clients hide information or are simply not aware of their own issues. Other clients may be aware of their issues and seem to be under control but may suddenly enter in a crisis due to unforeseen circumstances. Forms 04 and 05 help but may not capture all that there is to know about the client. At any moment of the client's journey within the NNPCN, at the first sign of complex-grief high-risk client, contact the Executive Director and/or the Case/Volunteer Coordinator immediately (step 9). Volunteers are not allowed to be alone with individual clients after hours. At all times, at least three persons must be at the office when an individual session is conducted: client, at least one volunteer, and one additional adult in the premises during the whole duration of the individual session.

Steps/ Tasks	Responsible		Form / List File / Folder	Questions/Notes
	Volunteers	Office		
1. HOSPICE CLIENT a) Hospice Volunteer presents Bereavement flyer (in Hospice Client folder) during first visit to family members /caregivers of a Hospice Client. b) Hospice Volunteer tells family members / caregivers that they are entitled to Anticipatory Grief Support immediately, or Bereavement and Grief support after their loved one passes away.	Hospice Volunteer	Volunteer Coordinator	FORM 21 "After a Loved One Dies" Brochure in Hospice Client folder FORM 19b Services Offer Letter (within three months after death) Office Client List	If Client says No , Hospice volunteer offers Library and Media Resources and/or Referral information to most appropriate agency. Hospice volunteer informs that client will receive Services Offer Letter within three months after death to give them the option of continuing with Bereavement services. Office sends letter at one month of death. If Client says Yes , proceed to Step 2 : a) Office phones Anticipatory Grief client immediately; or b) Office phones or sends Services Offer Letter to client within three months after death, using Office Client List or Intake Hanging Folder containing the hard file of the new client.
2. NEW CLIENT				

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<p>a) Family or caregivers of current or former Palliative Care Hospice client; or</p> <p>b) New client (first contact via website, phone call, visit to the Office, or referred by any external channel).</p>	Bereavement Volunteer	Volunteer Coordinator	<p>FORM 04a Client Intake (OFFICE)</p> <p>FORM 04b Client Referral-Intake (REFERRAL AGENCIES-NNPCN)</p> <p>Office Client List</p> <p>Hard file of the new client goes in:</p> <p>a) Intake Hanging Folder</p>	<p>Volunteer Coordinator, Case Coordinator or designated Bereavement Volunteer fills Form 04a/04b, enters Client's name and contact information in Office Client List, creates the hard and electronic files for the client, and files hard file in the Intake Hanging Folder. If client requires:</p> <p>a) Telephone Support: Volunteer Coordinator, Case Coordinator or designated Bereavement Volunteer gives the client the requested phone support;</p> <p>b) Information: Volunteer Coordinator, Case Coordinator or designated Bereavement Volunteer gives the client the requested information; offers Lending Library, Media Resources at the Office, and electronic resources in NNPCN website;</p> <p>c) Anticipatory Grief Support: Volunteer Coordinator phones caregiver(s) and/or family member(s) and asks if they want Anticipatory Grief Sessions at the Office, or Anticipatory Grief Support together with Hospice Services where the Hospice Palliative Care client is;</p>

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				<p>d) Urgent attention: Volunteer Coordinator contacts Executive Director or a trained Bereavement Volunteer / Case Coordinator immediately.</p> <p>e) Individual or group sessions: go to Step 3.</p>

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Steps/ Tasks	Responsible		Form / List File / Folder	Questions/Notes
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3. ANTICIPATORY GRIEF, INDIVIDUAL OR GROUP SESSIONS REQUESTED BY CLIENT	Bereavement Volunteer / Case Coordinator	Volunteer Coordinator	FORMS 04a/04b, 05, 06 and 07 Hard file of the client goes in: a) Intake Hanging Folder	a) Volunteer Coordinator makes sure that the electronic and hard files of the Bereavement client are open. File must show name, number, contact information and related bereavement information of the client. Hard file must contain Intake Form 04a or Referral-Intake Form 04b, Assessment Form 05, Confidentiality, Consents and Workbook Policy Form 06, Case Notes Form 07 and Evaluation of Services Form 11; hard file is filed in the Intake Hanging Folder. b) Volunteer Coordinator phones or forwards client file to Case Coordinator (trained to assess and deal with complex grief): - If Form 04a/b points at Anticipatory, Urgent, Complex or Other needs, Volunteer Coordinator or Case Coordinator (trained to assess and deal with complex grief) phones client to schedule Assessment interview to fill Form 05 as soon as possible (Assessment is fast-tracked whenever possible);

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Steps/ Tasks	Responsible		Form / List File / Folder	Questions/Notes
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				- If Form 04a/b points at Regular need, Volunteer Coordinator forwards client file to Case Coordinator for Assessment at a regular pace.

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	Volunteers	Office		
4. CLIENT ASSESSMENT	Bereavement Volunteer / Case Coordinator	Volunteer Coordinator	FORMS 04a/b, 05, 06 and 07 Hard file of the client goes in: a) Assessment Hanging Folder	a) If Anticipatory, Urgent, Complex , or Other have been checked on Form 04a/b : Volunteer Coordinator or Case Coordinator (trained to assess and deal with complex grief) schedules and conducts Assessment session to fill Form 05 Assessment at the Office; b) If requested, and real need is confirmed with Hospice Volunteer, the Assessment of Anticipatory Grief caregiver(s) and family member(s) of Hospice Palliative Care current client can be provided where the Hospice client is, upon decision of the Executive Director and/or Volunteer Coordinator; c) If requested, and real need is confirmed, the Assessment of shut-in clients, clients with severe mobility impairments, long-term care facility patients, retirement home partners, etc., can be done where the client is, upon decision of the Executive Director and/or Volunteer Coordinator;

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CLIENT ASSESSMENT (CONTINUED)				<p>d) If client is under medical treatment with psychiatrist / psychologist / psychotherapist / social worker / counselor, and complex issues are detected by Assessor (i.e. suicidal thoughts, depression, violence, aggressiveness, hallucinations, drug addiction, alcoholism, crime, serious family issues, etc.) during the Assessment, client is requested to sign Consent to Disclose Info Form 06 during the Assessment session. The health professional responsible for the client is then contacted by the Executive Director or Volunteer Coordinator. They ask the health professional what is the best course of action recommended to his/her patient. If client refuses to sign Form 06, client is notified of discharge by Case Coordinator, Volunteer Coordinator and/or Executive Directors.</p> <p>e) If client displays complex issues but has no family doctor nor is being seen by any other medical professional, go to Step 9;</p>

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CLIENT ASSESSMENT (CONTINUED)				<p>f) If Regular has been checked on Forms 04a/b and 05, Volunteer Coordinator or Case Coordinator phones a Bereavement Volunteer and pairs volunteer and client up. A first session is scheduled and Volunteer or Case Coordinator introduces the Bereavement Volunteer to the client in person.</p> <p>g) Volunteer and client decide if they want to work together. Client proceeds to individual or group sessions immediately, or goes to individual or group sessions' waitlist, depending on the availability of Volunteer(s).</p> <p>h) Volunteer and client have the right to ask to be paired up with someone else, in case a good rapport between them is not established. The Volunteer Coordinator then looks for another Volunteer and tries the pairing-up again.</p>

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Steps/ Tasks	Responsible		Form / List File / Folder	Questions/Notes
	Volunteers	Office		
5. CLIENT ACCEPTED	Bereavement Volunteer / Case Coordinator	Volunteer Coordinator	<p>Forms 04a/b, 05, 06, 07, 08, and 09</p> <p>Hard file of the client goes in:</p> <p>a) Individual Session Hanging Folder with the name of the client's Volunteer; or</p> <p>b) Group Session Hanging Folder; or</p> <p>c) Waitlist Hanging Folder</p>	<p>a) Individual Sessions: Case/Volunteer Coordinator and / or Bereavement Volunteer schedules first individual session with the client , and schedules subsequent sessions at the end of every weekly session;</p> <p>b) Group Sessions: Bereavement Co-Volunteers contact clients on the waitlist for Group Sessions to schedule the 8 Sessions;</p> <p>c) Waitlist: if no Volunteer for individual sessions is available, or if there are not enough clients to form a group, client is entered in the Waitlist for Individual or Group Sessions (Step 10).</p> <p>d) Duration of Session and Case Notes: Individual or Group Sessions last 90 minutes (1:30h). Sessions start and end on time. After each session, Volunteers have 30 minutes of interval to write their Case Notes and/or enter information on the database;</p>

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Page 11 of 18

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Steps/ Tasks	Responsible		Form / List File / Folder	Questions/Notes
	Volunteers	Office		
				e) Visiting Sessions: if requested, and real need is confirmed, Individual Sessions or Group Sessions of shut-in clients, clients with severe mobility impairments, long-term care facility patients, retirement home partners, etc., can be conducted where the client is, upon decision of the Executive Director and/or Volunteer Coordinator, provided that Volunteers are available and willing to go to the Client.
6. CLIENT TRACKING, INDIVIDUAL SESSION	Bereavement Volunteer / Case Coordinator	Volunteer Coordinator Executive Director	Form 08 Individual Session Report (VOLUNTEER) Form 08-09 Individual and Group Session Report (OFFICE)	a) At every last week of the month, Bereavement Volunteers send their filled Form 08 (VOLUNTEER) to the Volunteer Coordinator, Case Coordinator, or the designated Volunteer responsible for Form 08-09 (OFFICE) . b) The Volunteer Coordinator, Case Coordinator or designated Bereavement Volunteer updates clients' info on Form 08-09 (OFFICE) ; c) Form 08-09 (OFFICE) is reported to the Executive Director by the Volunteer Coordinator quarterly, on the last week of March, June, September and December.

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7. CLIENT TRACKING, GROUP SESSION	Bereavement Volunteer(s) / Case Coordinator	Volunteer Coordinator Executive Director	Form 09 Group Session Report (VOLUNTEER) Form 08-09 Individual and Group Session Report (OFFICE)	<p>a) Within the month after the last group session, Bereavement Volunteers send their filled Form 09 (VOLUNTEER) to the Volunteer Coordinator, Case Coordinator, or the designated Bereavement Volunteer responsible for Form 08-09 (OFFICE);</p> <p>b) The Volunteer Coordinator, Case Coordinator or designated NNPCN Volunteer updates group session clients' info on Form 08- 09 (OFFICE);</p> <p>c) Form 08-09 (OFFICE) is reported to the Executive Director by the Volunteer Coordinator quarterly, on the last week of March, June, September and December.</p>

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8. WHERE APPLICABLE After the Client is Assessed, if client has difficulty to come to the Office for Individual or Group Sessions and there are no Volunteers available to go to the client, or the client does not wish Visiting Bereavement Support, the Thirteen-Month Support Program can offered as an alternative.	Bereavement Volunteer(s) / Case Coordinator	Volunteer Coordinator	Form 10 Thirteen-Month Support Program Report Hard file of client with hard copy of Form 10 goes in: Thirteen-Month Support Program Hanging Folder.	a) If client requests the Thirteen-Month Support Program, Volunteer Coordinator, Case Coordinator or designated Bereavement Volunteer use Form 10 . After the service is completed, file is closed in database and hard file; b) If client phones for some occasional phone support, no Form is necessary: a simple Case Note is entered in the file of the client.

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Steps/ Tasks	Responsible		Form / List File / Folder	Questions/Notes
	Volunteers	Office		
<p>9. a) COMPLICATED GRIEF OR HIGH-RISK CLIENT IS DETECTED during sessions; or</p> <p>b) COMPLICATED GRIEF OR HIGH-RISK CLIENT IS MANIFESTED suddenly in the course of individual sessions, group sessions, or at any point of the relationship between the client and the Office.</p>	<p>Bereavement Volunteer(s) / Case Coordinator</p>	<p>Executive Director</p> <p>Volunteer Coordinator</p>	<p>Forms 04a/b, 05, 06, 07, 08 and 09</p>	<p>a) Case/Volunteer Coordinator and/or Bereavement Volunteer notify Executive Director and Volunteer Coordinator immediately, and set up appointment to debrief E.D. regarding issues and recommendations.</p> <p>b) Executive Director, Volunteer Coordinator and Case Coordinator to plan recourse on a case-by-case basis.</p>

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20 Bereavement Services Steps - 2016-11-05



NEAR NORTH PALLIATIVE CARE NETWORK

2025 Main Street West, North Bay, ON, P1B 2X6

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Steps/ Tasks	Responsible		Form / List File / Folder	Questions/Notes
	Volunteers	Office		
10. MANAGEMENT OF INDIVIDUAL SESSION WAITLIST, GROUP SESSION WAITLIST AND DAY PROGRAM LIST	Bereavement Volunteer(s) / Case Coordinator	Volunteer Coordinator	FORMS 15a, 20a Office Client list Group Session Waitlist Day Program List Hard file of the client goes in: a) Individual Session Waitlist Hanging Folder b) Group Session Waitlist Hanging Folder c) Day Program Hanging Folder	Volunteer Coordinator, Case Coordinator or designated Bereavement Volunteer in charge of the Office Client List, Individual Session Waitlist, Group Session Waitlist and / or Day Program List, places client on next available individual session, group session waitlists or Day Program list.

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Steps/ Tasks	Responsible		Form / List File / Folder	Questions/Notes
	Volunteers	Office		
11. INDIVIDUAL / GROUP SESSIONS - SERVICE CLOSURE	Bereavement Volunteer(s) / Case Coordinator	Executive Director Volunteer Coordinator	Form 11 Evaluation of Bereavement Services	<p>a) Volunteer Coordinator, Case Coordinator and/or Bereavement Volunteer request client to fill form 11, seal it in an envelope and hand it out to Case Coordinator or Volunteer Coordinator;</p> <p>b) Executive Director, Volunteer Coordinator and / or Case Coordinator are notified of completion of services;</p> <p>c) Client evaluation is assessed by Executive Director, Volunteer Coordinator and /or Case Coordinator.</p> <p>d) Volunteer Coordinator, Case Coordinator, or designated Bereavement Volunteer closes hard file and database (on tracking forms and online).</p>

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Steps/ Tasks	Responsible		Form / List File / Folder	Questions/Notes
	Volunteers	Office		
12. ENROLLMENT IN THE DAY PROGRAM	Bereavement Volunteer(s) / Case Coordinator	Volunteer Coordinator	Form 20a Day Program List Hard file of the client goes in: a) Day Program Hanging Folder	After client successfully completes the 8 individual sessions or group sessions, fills Form 11 Evaluation of Services , and manifests the desire to receive further Bereavement Services, Volunteer Coordinator, Case Coordinator and / or designated Bereavement Volunteer in charge of the update of the database and of the Day Program List, restarts services to the client on the database, puts client's name and contact information on Form 20a Day Program List , and transfers the hard file of the client to the Day Program hanging folder.

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Steps/ Tasks	Responsible		Form / List File / Folder	Questions/Notes
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13. RE-CONTACT AND CLIENT DISCHARGE LETTERS If the client: a) interrupts ongoing sessions for a justified reason; b) moved out, changed contact information such as phone number/email , etc., and forgot to notify the Office; c) has not been in touch with the NNPCN after applying for services for over 3 months, for any other reason.	Bereavement Volunteer(s) / Case Coordinator	Volunteer Coordinator Executive Director	Forms 12, 13	a) Volunteer Coordinator, Case Coordinator or Bereavement Volunteer sends Form 12 Re-contact Letter signed by the Executive Director; c) In case client does not respond Re-contact Letter, the Office then sends Form 13 Discharge Letter signed by the Executive Director.
14. AFTER CLIENT DISCHARGE LETTER IS SENT		Volunteer Coordinator		Volunteer Coordinator, Case Coordinator or designated Bereavement Volunteer closes hard file and info anywhere on tracking forms and online and archives hard file.

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