Managing CLIENT CARE

SECOND EDITION

Elizabeth F. Wywialowski

Mosby

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Managing
CLIENT
CARE

In Appreciation of
Amalia ("Aimee") Konz
and
Irene R. Schreck

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Instructor Preface

Managing Client Care addresses the essential components of the client care manager role. Entry-level staff nurses and their employers are well aware of the need for staff nurses to manage client care effectively and efficiently, especially as efforts to control health-care costs and maintain quality continue. To develop the appropriate content for a text that prepares staff nurses to manage client care, DACUM (*d*eveloping *a c*urriculu*m*) studies were undertaken to identify the essential components of the entry-level staff nurse's role as a client care manager. A subsequent review of the findings of these studies revealed that in many instructional programs the curriculum content, teaching strategies, and time allotted to the client care manager role unintentionally fell short of what was needed. Other management/leadership textbooks that were available contained some of the needed information but omitted other major areas identified by the DACUM studies.

Retaining the integrity and intent of the earlier DACUM findings, the second edition of *Managing Client Care* focuses on the essential management competencies (skills) that are expected of entry-level staff nurses in today's evolving health-care scene. The competencies are described in language that is common to staff nurses in the practice settings in which they are typically employed, such as acute- and long-term–care inpatient and ambulatory care settings. The interchangeable use of the terms *entry-level staff nurse* and *client care manager* in the text underscores the nurse's key role as a manager of client care.

A *competency* consists of a combination of the knowledge, values, and psychomotor skills that are required to perform the desired observable or measurable behaviors. The term also refers to a general category of activities or duties required of a worker in an occupational category. This text uses a competency framework to present client care management concepts. The material is organized around the essential competencies required to fulfill the client care manager role. Such a competency-based approach is consistent with the trend of the health-care system toward increased emphasis on quality improvement and measurable outcomes.

It is important to distinguish this competency framework from the traditional approach to organizing nursing textbook content, which is characterized by separate cognitive, affective, or psychomotor learning outcomes. In comparison, this text is organized around the competencies needed to manage client care, rather than the topics related to it. The competencies are arranged in order of increasing complexity, allowing students to learn less complex skills before attempting more complex skills. The competency framework may appear more complex in nature but actually is better suited to the measurement of outcome-based learning in today's increasingly complex nursing practice settings. Each chapter of the text addresses an essential competency of the client care manager role, focusing on the specific knowledge, beliefs, and technical skills that the learner needs to perform that competency.

Competency-based instructional programs differ from more traditional curricula in another way as well. Competency-based programs are consistent with current educational trends that focus on research-based criteria and accountability. Rather than emphasize predetermined content or a specified number of instructional hours, competency-based programs focus on behaviors that learners need to succeed in an

occupational endeavor. They emphasize demonstrated performance of required skills and adherence to the criteria that are inherent in safe, reliable practice. Because competency-based instruction relies heavily on building more complex skills on previously learned, less complex ones, the client care management skills described in this text build on competencies that students will have acquired in their previous coursework, such as those needed to provide client care and to fulfill responsibilities as members of the discipline of nursing.

Competencies are also *context specific*—that is, a single competency will differ somewhat from practice setting to practice setting, because unique factors in each setting influence how, when, and why the nurse intervenes and what interventions are chosen. Thus the competencies will differ slightly among acute- or long-term inpatient settings and community-based settings. Therefore each chapter defines key concepts in the context in which they are applied, providing a solid basis for clinical application. Principles and processes are discussed in a manner that clarifies their application in fulfilling nursing obligations in general and the duties of entry-level staff nurses in particular. Numerous examples are included throughout the text as illustration.

The second edition of *Managing Client Care* incorporates numerous changes that correspond with evolving management concepts, health-care system issues, and research findings. The text is organized into four units. Unit One, "Understanding the Client Care Environment" (Chapters 1 to 4), addresses the competencies related to understanding the environment in which client care is delivered and the importance of prioritizing tasks. These competencies are fundamental to effective client care management, particularly in light of the rapid changes in American health care as a result of the effects of the global economy, organizational restructuring, the vested interests of organizations that finance health-care services, and the "information age." Unit Two, "Managing Client Care" (Chapters 5 to 9), focuses on the competencies used to manage resources. To prepare learners to cope with the impact of economic scarcity in today's health-care system, an all-new Chapter 5 was added to explain how the staff nurse can conserve organizational resources while delivering safe, effective care. This chapter distinguishes among organizational, human, time, information, financial, and other resources and explains the staff nurses' role in managing all resources cost effectively. It also includes a section that explains the role of nursing research in providing cost effective, outcome-oriented nursing care. Chapters 6 to 9 are designed to help learners build on previously acquired competencies to develop interrelated management skills. Unit Three, "Managing Others" (Chapters 10 to 14), addresses the essential skills needed to manage other nursing or interdisciplinary work group members involved in providing client care. Unit Four, "Professional Development" (Chapters 15 and 16 and the Epilogue), acquaints the learner with ethical and legal issues and promotes the development of professional integrity and career management skills. Throughout the book, new topic subheadings have been added, and many sections reorganized to facilitate the learning process.

Special features of the text are also designed to facilitate optimal learning and retention of chapter content. The eye-catching two-color design, new to this edition, not only increases the visual appeal of the text, but also highlights its pedagogic fea-

tures, thus increasing its usefulness to the student. Features that appear in each chapter include: **objectives**, which outline the chapter's learning goals and help the student focus on key information; **key concepts**, which list important terms and concepts found in the chapter and help focus the student's attention on important content; **summary**, which condenses key chapter content in brief narrative form and facilitates review of important points; **application exercises**, which encourage the student to apply chapter content to real-life situations and think critically about them; and the new **critical thinking scenario** at the end of each chapter, which presents a brief narrative case study that incorporates principles discussed in the chapter and follow-up questions that encourage students to apply chapter concepts while thinking critically about the scenarios. Throughout the text are sample forms, worksheets, logs, checklists, and other "hands-on" learning tools that both familiarize students with forms they will likely encounter in the workplace and serve as convenient learning tools that guide practical application of chapter content. The entertaining cartoons that appear in every chapter add variety and humor while highlighting key points about client care management. In addition, the accompanying *Instructor's Manual for MANAGING CLIENT CARE, Second Edition*, includes suggested learning activities, student worksheets and review sheets, performance checklists, and a new detailed case study for each chapter, with follow-up questions designed to promote critical thinking and application of chapter content. Its pages are perforated and three-hole punched for convenient integration into lesson plans.

Managing Client Care was written with a twofold purpose: to prepare nursing students to make a successful transition from learner to practitioner, and to teach the competencies needed to manage the care of a group of clients effectively and efficiently in today's health-care system. It is designed to serve as a client care management primer for nursing students who are about to enter the work force rather than an encyclopedia of comprehensive knowledge that staff nurses need to manage client care. This text provides a solid foundation on which staff nurses may begin their careers as client care managers, while encouraging them to put forth the continuous effort required to build on that foundation and remain competent throughout their careers.

Acknowledgments

Writing *Managing Client Care* has taught me that as an author, I need many hours of solitude to allow for concentration plus a great deal of mental energy—both to compose and to resist more leisurely temptations such as golf or nature walks. Without the encouragement, help, and support of many people, I could not have completed this book. I acknowledge them here with sincere gratitude.

- My friends and colleagues, especially Amalia ("Aimee") Konz and Irene Schreck, who continuously encouraged me to persevere through an extensive literature review and manuscript revisions. Both Aimee and Irene have provided excellent role models for professional nurses. Each made significant contributions to the nursing profession for many years, performing ordinary nursing activities extraordinarily well. The nurses who were privileged to work closely with them are keenly aware of their many talents. Aimee characteristically helped other nurses realize their nursing potential; Irene focused on details of sound practice, providing sensitive, compassionate care. I thank them for their encouragement and support, and I want them to know how very much I appreciate each of them as friends and professional nurses. I trust that every entry-level staff nurse will be endowed with similar role models.
- My dear friend, Roxanne Sieracki, who assisted with the literature review and proofread and critiqued early drafts to ensure that the specific management competencies were addressed with clarity. Roxanne also developed a very practical Instructor's Manual to accompany the text. Her insights were invaluable.
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- My family, who repeatedly reminded me of my real priorities in life. They encouraged me when my enthusiasm waned and laughed with me when situations made laughter impossible to resist. Each in his or her own way lovingly adjusted plans so that the time we could spend together inspired me to finish the book without delay.

Elizabeth F. Wywialowski

To the Student

As an entry-level staff nurse in today's changing health-care system, you'll need strong client care management skills more than ever before. The second edition of *Managing Client Care* not only provides the necessary conceptual knowledge but also offers practical strategies to help you apply the knowledge and perform the skills that are so vital to your success as manager of client care. This book may differ from other texts that you have used in that it is organized not according to *topics* but around the *competencies* that you'll need to fulfill the role of client care manager. A *competency* is a combination of the knowledge, values, and psychomotor skills needed to perform desired observable or measurable behaviors.

Your text is divided into four units that reflect the key groups of competencies in client care management. Unit One, "Understanding the Client Care Environment" (Chapters 1 to 4), addresses the competencies that you'll need to understand the environment in which client care is delivered and to prioritize tasks effectively and efficiently. You'll find these competencies to be especially important because of the rapid changes taking place in health care today—changes that result from shifts in the global economy, organizational restructuring, the vested interests of health-care financing organizations, and the "information age." Unit Two, "Managing Client Care" (Chapters 5 to 9), focuses on the competencies that will allow you to manage resources effectively in this era of economic scarcity. It builds on competencies you will have acquired in previous courses to help you develop additional interrelated management skills. Unit Three, "Managing Others" (Chapters 10 to 14), addresses the essential skills that will enable you to manage other nursing or interdisciplinary work group members who are involved with you in providing client care. Unit Four, "Professional Development" (Chapters 15 and 16 and the Epilogue), acquaints you with important ethical and legal issues, offers strategies for nurturing your professional integrity, and sharpens your career management skills.

To help you make the most of your learning experience, try the following strategy after you complete each chapter: Stop and think about what the chapter conveyed. What does it mean for you as a client care manager? How does the chapter's content, and your interaction with it, relate to that of the other chapters you have already completed? How might you briefly summarize the content for a nonnurse friend? Reading the chapter, restating its key points in your own words, and completing the Application Exercises and Critical Thinking Scenario as suggested in the next section ("Learning Aids") will go far to help you make the content truly your own.

Learning Aids

The second edition of *Managing Client Care* features some important tools designed to help you learn about the principles of client care management and apply your new knowledge to the real world. Following is a description of some of these tools, along with suggestions about ways in which you can use these study aids to your best advantage:

Use the learning aids in each chapter to help you think critically about the material presented.

- The **objectives** describe the chapter's broad learning goals. Use them to guide you in choosing the general content areas on which to concentrate as you scan the chapter.
- The **key concepts** provide a more detailed list of the chapter's important terms and concepts. You'll want to focus particular attention on them as you study the text more closely. The boldface, brightly colored type in which the key concepts appear helps you locate them easily, whether you're scanning the chapter for specific information or reviewing for an examination.
- The **summary** condenses the chapter's key points into a brief narrative form. You might find it helpful to read the summary both *before* starting the chapter, as a "preview" of the material to come, and again *afterward*, as a way to increase your recall of the material you've just covered.
- The **application exercises** contain questions that challenge you to apply the chapter's key concepts to real-life situations. Completing them will help sharpen your ability to think critically and to apply the chapter content that you've learned.
- The **critical thinking scenario** at the end of each chapter is a brief case study that presents a situation you might encounter as a staff nurse. After the scenario are some follow-up questions that challenge you to apply chapter concepts to the scenario. Like the application exercises, the critical thinking scenarios will help sharpen your critical thinking and application skills.

The role of client care manager is a challenging and rewarding one. The skill with which you perform it directly affects the quality of care that clients receive, as well as the efficiency and effectiveness with which it is delivered. The author and all of the people who worked on this book have made every attempt to reflect these facts in the design and approach of *Managing Client Care.* We wish you much success in your career!

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chapter one

Introduction to Client Care Management

objectives

When you complete this chapter, you should be able to:

1. List components of client care management.
2. Describe the relationship of nursing roles and skills to the client care manager role.
3. Explain the differences between nursing management and nursing leadership.
4. Describe the primary purposes of health-care organizations as compared to those of other human service organizations.
5. Describe three common types of organizational structures.
6. Explain the differences between formal and informal organizations.
7. Describe four common management theories of human motivation.
8. List two organizational changes anticipated in the future.

key concepts

role
nursing role
core nursing roles
context
client care manager role
nursing management
nursing leadership
organization of a work group
bureaucracy
adhocracy
matrix organizations
learning organizations
formal organizations
informal organizations
human motivations
Maslow's hierarchy of needs
Theory X
Theory Y
Theory A
Theory Z
situational leadership

This book is about client care management. It was written primarily for nursing students preparing to become entry-level staff nurses employed in inpatient and ambulatory care settings. Beginning staff nurses are expected to provide services that prevent diseases and promote and maintain health, as well as to provide care for the ill or infirm. Throughout the text, the term client instead of patient is used to designate the recipients of nursing service. The term patient implies a passive role; it does not emphasize the individual's active participation in his or her health care. The term client is used to emphasize the professional nature of the relationship between nurses and those they serve; it reflects the evolution of nursing as a profession, the client's needs as a consumer as the focus of the interaction, and the necessity of a working relationship that is rewarding to both the consumer as well as the nurse.

This book discusses basic concepts of management related to the practice of nursing. It emphasizes the practical application of these concepts in settings in which beginning staff nurses are commonly employed. These inpatient or ambulatory care settings support the inexperienced nurse by providing structure (e.g., policies, protocols, procedures, and guidelines) and resources (e.g., supervision by more experienced nurses, preceptorships, and structured professional development programs). As the entry-level nurse has successful experiences and gains confidence and expertise, need for such support decreases, and eventually the nurse can practice in less structured or unstructured settings (e.g., public health or home-based care).

Entry-level staff nurses manage client care directly. They manage care for a specified period of time such as a shift, in contrast with nurses who manage care throughout a client's inpatient stay or for an indefinite time period (e.g., a primary provider in a community-based setting). They should not overlook or minimize their influence as critical decision makers in the use of available resources to provide cost-effective care. Nurses who supervise beginning staff nurses in first-line management positions, such as nurse managers, typically manage client care indirectly. The client care manager role is integral to nursing practice.

To succeed as a staff nurse, client care management skills are essential. Without these skills, entry-level staff nurses cannot effectively practice nursing in inpatient or ambulatory care settings. In the past, most nurses developed client care management skills after graduation from their basic nursing programs, often through trial and error. But because client care management skills are essential, nursing students must begin to develop them before they begin practicing. Entry-level staff nurses are likely to find that developing these skills is an ongoing process.

Competencies of Client Care Managers

What competencies (required skills) are expected of entry-level staff nurses as client care managers? To succeed as staff nurses, client care managers use organizational resources and routines while providing direct client care, use time productively, collaborate with the interdisciplinary team, and use leadership characteristics to manage others on the nursing team. More specifically, to manage client care, entry-level nurses:

1. Identify organizational resources and determine when they are needed.
2. Work within various nursing service delivery patterns.
3. Use position descriptions to establish the scope and limitations of their own and other nursing team member practices.
4. Manage time purposefully and productively.
5. Prioritize client needs and related care.
6. Exhibit flexibility in providing care within available time constraints.
7. Show initiative and creativity as leadership qualities.
8. Use decision-making skills.
9. Defend their own decisions.
10. Work with other health team members.
11. Resolve conflicts within the team.
12. Delegate appropriately.

Relationships of Other Nursing Roles to the Client Care Manager Role

This book is based on information gathered from nurses practicing in acute and long-term inpatient and home care settings; it focuses on the management of client care. It covers skills expected of entry-level staff nurses employed in acute and long-term settings. The competencies discussed in this book were identified by entry-level staff nurses and their immediate supervisors, who indicated that these skills were essential for successful practice by beginning staff nurses. They arranged these skills and tasks in order of increasing complexity. This arrangement was used to organize the learning activities in this book to help nursing students learn less complex client care management skills before attempting more complex ones. This approach is based on the belief that client care management involves the use of agency resources to effectively and efficiently provide needed services.

A **role** is an expected typical behavior of a person with a specific status or social position. For example, parents are expected to behave in certain ways in the protection and care of their children. The role of an employee relates to the function, purpose, or tasks he or she performs for the organization. The practice of nursing is made up of several interrelated roles. A **nursing role** is a set of expectations that the nurse must fulfill; it includes applying professional knowledge, exhibiting attitudes, and demonstrating behaviors common to the practice of nursing. **Core nursing roles** are roles that are common to all practicing nurses. They include being a provider of care, a member of the profession, and a manager of client care. Other common roles include communicator, client teacher, and investigator. These common roles have been identified by nursing educators and administrators as a convenient way to organize components of nursing practice.

The process of learning to practice nursing is not universal, but there are common patterns. Learning to perform each nursing role usually proceeds from less complex to more complex activities.

Role as Client Care Provider

In practice, the beginning staff nurse performs various aspects of each of the interrelated nursing roles identified earlier, depending on the client's needs and the resources available to meet these needs. In addition, the nurse uses various skills adapted to the setting, or **context** (i.e., he or she behaves in ways that are appropriate in the specific nursing practice environment). Each nursing practice environment is affected by its organizational system, its primary purposes, routines, policies, and procedures. The nurse's practice environment significantly influences his or her activities. In the larger social context, the nurse is expected to adhere to various laws and codes of ethics.

Role as Member of a Profession

Typically, nursing students learn to use the nursing process before they learn to teach clients about the complexities of self-care. While learning to apply the nursing process, students develop communication skills, identify legal and ethical issues, and adhere to codes of conduct. On the basis of their individual strengths and limitations, students learn to accept responsibility for self-directed learning early in their careers and when to seek assistance with client care. As they progress through their instructional activities, they learn about legal and ethical issues and various client needs and health problems throughout the life span. As they learn about ethical issues and legal constraints associated with various treatment options, they are expected to respond to client needs within the context of an agency's policies and procedures and the state laws influencing nursing practice. Fulfilling role requirements as a member of the profession prepares the student for the client care manager role. The nursing student applies knowledge of legal and ethical issues to identify priorities for individual clients.

Role as Client Care Manager

The **client care manager role** requires the nursing student to address the priorities of an assigned group of clients for a specified time period. Only skills that are basic to client care management are addressed in this book. Basic nursing skills used in providing clinical care and fulfilling requirements as a member of the nursing profession are fundamental building blocks for developing client care management skills and for succeeding as an entry-level staff nurse. Often, depending on the amount of time available, nursing students gain "management" experience immediately before graduation.

When students advance beyond caring for more than one or two clients, they are typically required to demonstrate skills needed to manage nursing care for a group of clients. This progression suggests that in most nursing practice settings, client care management skills evolve from existing skills in less complex roles. In other words, some client care management skills depend on mastering less complex and interrelated roles. Accordingly, learners tend to learn client management skills after they acquire other less complex nursing skills. The entry level staff nurse will use

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