INTEGRATING NURSING INTERVENTION WITH SOCIAL WORK SERVICES

Family Caregiver Support Program 2005
CAREGIVER NURSING PROTOCOL:
INTEGRATING NURSING INTERVENTION
WITH SOCIAL WORK SERVICES

Philadelphia Corporation for Aging

Joan Klein, M.S.W., L.S.W.
Allen Glicksman, Ph.D.
Irene Warner Maron, R.N.C., M.A.M.L.S.P.

This project was supported, in part, by grant, number 90CG2530, from the Administration on Aging, Department of Health and Human Services, Washington, D.C. 200201. Grantees undertaking projects under government sponsorship are encouraged to express freely their findings and conclusions. Points of view or opinions do not, therefore, necessarily represent official Administration on Aging policy.

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INTRODUCTION

This protocol grows out of a study conducted by Philadelphia Corporation for Aging’s Family Caregiver Support Program (FCSP) and funded by the Administration on Aging (grant #90CG2530). The purpose of the study was to determine if providing caregivers with the services of a nurse, as part of a larger caregiver program, would improve the health of the caregiver. Also needed was a determination of “what” nursing interventions would be appropriate. Research had previously shown that caregivers were likely to ignore their own health, and that this had serious consequences for the caregiver and for the carerecipient alike. We were further concerned with the health of African American caregivers in particular. In addition to the problems facing all caregivers, African Americans often have more difficulty in accessing the health care system, which suggested that African American caregivers might have even greater health problems than their Caucasian counterparts.

Our study compared the experience of a group of caregivers, evenly split between Caucasian and African American daughters and daughters-in-law who received a nursing intervention with a control group, matched for race, who did not receive the intervention over a three month period. Both groups received a comprehensive evaluation by the nurse, which complemented the assessment they received from the social work staff at the time they become clients of the FCSP. These caregivers had been assessed in domains of physical health, functioning, strengths, stress, and history of caregiving by trained social workers. The physical environment was also assessed to evaluate barriers to caregiving and carerecipient independence. Caregivers in FCSP received financial reimbursement for services such as; homemaker, personal care or day care services as well as supplies and overnight care, to help ease the stress and burden of caregiving. Financial assistance was also available to improve the physical environment to enable the carerecipient to be as independent as possible and relieve caregiver stress and strain in performing caregiving tasks.

The overall findings showed that in areas of depressive symptoms and feelings of mastery over the caregiving situation, the presence of a nurse did make a difference. Benefits were shown for both the Caucasian and African American caregivers. Because of the success we had with our intervention we have developed this protocol so other agencies can develop similar programs.
WHAT ARE THE CHARACTERISTICS OF CAREGIVERS IN FCSP WHO COULD USE A NURSING INTERVENTION?

Physical Health Care
> Caregivers who don’t have health insurance and/or who have not had any recent medical care.
> Caregivers who have chronic illness such as diabetes, hypertension, unstable health conditions, etc. and need additional follow-up.

Education
> Carerecipients who are frequently hospitalized within a short period of time or frequent ER visits.
> Caregivers and carerecipients who need health education re: body mechanics, diet for diabetes, weight loss, skin care, smoking cessation, stress management/high Zarit score, relaxation techniques.
> Caregivers who have difficulty/frustration managing carerecipient’s symptoms or behavior.
> Caregivers who require medical information concerning end of life issues re: peg tube, ventilator, etc.
> Caregivers who are non-compliant with self medications and need medication education.
> Caregivers who have difficulty navigating the medical system.

Mental Health: Emotional/Social well-being
> Caregivers who are feeling depressed, hopeless, anxious, angry, etc.
> Caregivers who are isolated.

WHAT SHOULD THE NURSE PROVIDE?
> Nursing assessment based on the Home Health Model with a focus on the caregiver.
> Health education re; diet, disease management, etc.
> Information concerning prevention re; complications of aging, skin integrity, constipation, mobility, turning, transfers, medications.
> Help to link caregiver to medical treatment.
> Future planning for caregiver.
> Mental health support.
FOR HOW LONG?

> 1-6 visits.

> Length and pattern of visits to be determined; based on issues identified in collaboration with the caregiver and social worker.

WHAT IS THE PROCESS

> As each new caregiver enters the program, based on the results of the baseline assessment, a referral will be made after consultation with the FCSP supervisor. Criteria listed previously, as well as basic demographics, special instructions, best time to call, insurance information including numbers is included on the form with check off boxes. (appendix 1)

> Nurse completes the nursing assessment (appendix 2) and develops a care plan (appendix 3) which includes the prescribed visiting pattern and desired outcomes.

> The nurse and social worker will collaborate, working together to address caregiver issues and needed referrals.

> The nursing records, at the end of the intervention, will be incorporated into the caregiver’s file.

NURSE QUALIFICATIONS

> Experience in aging and an understanding of geriatrics (physical, mental health and family issues).

> Minimum 2 years experience in gerontology and adult health.

> Bachelor’s degree in nursing or related field.

> Community/Home Health experience.
The nurse introduced the concept of the intervention by offering the services of a nurse for the caregiver, rather than directly for the carereceiver. The nurse would work with the participant to identify health needs important to the carereceiver. Together, the caregiver and the nurse designed a care plan to address issues that would fall into the following categories:

1. **Disease Management.** Many of the participants had been previously diagnosed with hypertension, diabetes, arthritis, elevated cholesterol levels or other common medical problems. In particular, many participants were aware that they were diagnosed with diabetes but they had little understanding of the disease process, signs and symptoms, glucose management, use of medications or glucose monitoring. Interventions to translate medical information into a language that could be used by the participants were provided with the goal being an improved understanding of the disease process, signs and symptoms to report to the physician and knowledge of medications to treat the problem. All participants received written medication information. Caregivers who spoke Spanish or who were bilingual were given medication information in Spanish.

2. **Symptom Management.** A number of the participants in the program had needs for smoking cessation, bladder control improvement, constipation prevention, pain management and other related problems which are able to be discussed within the confines of the caregiver’s home rather than in a physician’s office. Obesity, excessive sodium use and other dietary issues can also be addressed in the caregiver’s own kitchen by observing meal planning and offering suggestions for alternatives. HIV prevention was discussed with many participants. In particular, weight management was a specific need identified by many participants.

3. **Emotional issues of the caregivers.** Many participants reported symptoms consistent with depression. This appeared to be particularly prominent in caregivers who were reluctant to take over the caregiving role but felt that there was no other alternative and those who had limited opportunity for activities outside the home. Although participants who worked outside the home had additional sources of stress, those who remained home with the carereceiver on a daily basis experienced stress as well.

4. **Behavior Management issues of the carereceivers.** Repetitive questions, impairment of memory, loss of personal care abilities, confusion, wandering, combativeness or insomnia were addressed in terms of what common approaches may be implemented, what had been attempted by the caregiver and understanding why confused individuals may act in ways that are perceived as negative.
5. **Health concerns of the carereceivers.** A number of the participants cared for family members who were bed bound. Specific interventions to address the prevention of complications from bed rest were provided including constipation, pressure ulcers and depression. Fall prevention interventions were provided for many of the carereceivers.

6. **Access issues.** A number of participants had lost their medical insurance when they left the work force to care for family members. Others had no coverage or very limited coverage. A small number of caregivers were provided with health services through public health centers; however, these centers may offer limited benefits to this population who cannot leave the home and the carereceiver for prolonged periods of time to seek their own medical care. On one occasion, a participant who was severely depressed but who lacked health insurance or resources was referred to a university study focusing on depression. Program information for mammograms and PAP tests were provided. Telemedicine, a system using two-way audio and video communication as well as electronic vital signs was used to provide data of participant’s blood pressure readings. In general, the system allowed caregivers to collect information about their blood pressure and pulse and share this information with their health care provider. Participants, who lacked insurance, lacked the ability to leave the carereceivers for prolonged periods of time or who had to pay out of pocket for their care, used the system to obtain multiple blood pressure readings which decreased the number of visits to the health care provider.

7. **End of Life issues.** Caregivers voiced the need for information on advance directives, CPR, feeding tubes and other issues that arise with elderly clients. A discussion of the pros and cons of medical interventions and establishing a dialogue with carereceivers and other family members was provided.

8. **Future Planning.** Participants were asked to consider what other activities they would do if being a caregiver was no longer necessary due to death, placement or other issues. This began the dialogue of future planning and transitioning from the role of caregiver to another role. For some, viewing the caregiving role as a marketable skill was quite helpful.
COMMENTS AND OBSERVATIONS

Nursing interventions for this diverse group of women ranged from providing emotional support to alerting the participant to serious health problems. Once a caregiver agreed to participate in the program, it was necessary to carve out some time for nursing visits, time which was frequently scarce. It was noted that many women stated they could express their needs and problems with the nurse rather than with a physician. This may be an effect of gender, the care being rendered in the participants own house, or a perception about nurses. Caregivers appeared to respond more openly when a white lab coat was worn.

The major problem with the intervention mirrored the problems in the greater society: access to health care remains a problem for over 45 million Americans. Nursing assessments provided some identification of health problems, however securing a source of health care was not possible in all cases. Participants did appear to derive a benefit from nursing visits, particularly having attention for their own health needs instead of the usual focus on the carereceiver.

CONCLUSIONS

As said in the introduction, the overall findings showed that in areas of depressive symptoms and feelings of mastery over the caregiving situation the presence of a nurse did make a difference. There were two time constraints created by the research protocol which may have prevented seeing further benefits. First, the intervention was set at three months, rather than tailoring the time frame to the specific need of the caregiver. Second, we were not able to evaluate the effect of any follow up medical intervention based on recommendations of our nurse. These constraints will not exist in a clinical setting.

Because of the conditions created by the need to collect data for research purposes, we cannot be overly specific about outcomes that might occur from this program in a clinical setting. For example, we selected only daughter and daughter-in-law caregivers for this study in order to restrict the sample to one type of caregiver for research purposes. In a clinical setting this protocol would be appropriate for any type of caregiver; male, female, spouse and caregivers with other relations to the carereceiver, as well as daughters and daughters- in-law. Overall, we would expect to see a greater sense of mastery over problems, improved feelings of well-being and increased knowledge on the part of the caregiver. Further outcomes may depend on the exact way in which the nurse is used within the caregiving program. For instance, if caregivers are entered into this protocol when they first become clients of the program the nurse may uncover health conditions of which the caregiver is unaware, although this may occur even if the caregiver has been a client for some time. The presence of another set of “eyes and ears” may also assist the caregiver in heading off health problems for both the caregiver and the carereceiver. Although the carereceiver is not the target of the intervention, it is likely that the nurse, like the social worker who manages the case, will see the carerecipient and be able to observe significant changes or problems.

We feel that the intervention will benefit the emotional and physical health of the caregiver and by so doing have a positive effect on the carerecipient and perhaps even other family members as well.
Nursing/Social Work Intervention for Caregivers

Case Example

CARERECIPIENT
Daughter
Age 64
Hypotensive
Smokes - 1 - 2 pkg/day
Emphysema
Lives in duplex above parents with husband

CARERECIPIENT
Father
Age 91
Alert and oriented
Colon CA
CAD
DM

CARERECIPIENT
Mother
Age 87
Mid Stage A.D.
Incontinent

OUTCOMES
Nebulizer obtained.
Decrease in cigarette consumption to 3 - 4 day.
Personal care for CR provided.
Reimbursed for adults briefs.
CG engaged siblings to help with care of parents.

NURSING INTERVENTION
Substitutions for smoking; (decrease intake).
Disease Education re: symptom and medication management.
Address respiratory problems through nursing advocacy contacting physician to access nebulizer.

SOCIAL WORK INTERVENTION
Provide respite through FCSP services.
Reimbursement for medical supplies.
Provide emotional support and encouragement.
Empower CG to engage family to provide additional support.

REFERRAL FOR NURSING
CG unstable Emphysema
Nicotine Addiction
Stress Management
Diseases
- Rheumatoid Arthritis (RA)
- Degenerative Joint Disorder (DJD)
- Diabetes Mellitus (DM)
- Hypertension (HPT)
- Obesity
- Hypercholesterolemia
- Depression
- Incontinence

Interventions
- Monitoring: BP, blood glucose
- Teaching: diabetes, hypertension, CHF, COPD
- Medication teaching, scheduling
- Symptom management; constipation, pain management, UTI prevention
- Protocol related management: adverse drug reactions, pain, fall prevention, herbal remedies/drug interactions
- Continence management
- HIV disease prevention
- Pressure ulcer prevention/treatment
- Smoking cessation
- Weight loss management
- Back injury prevention/treatment
- Glaucoma treatment/instillation of eye drop
- Prevention care bedridden individuals
- Home management for individuals with asthma, COPD

Access Issues
- Medical and Dental Clinics
- Reduced/free private physician services
- Medication access
- Speech, Physical, and/or Occupational Therapy referrals
- Study referrals
- Mammogram/PAP test
- Community Mental Health
- Telehealth intervention

Psychosocial Support
- Viewing caregiver skills as marketable skill
- Future planning
- Language to dialogue between children and parents
- Understanding confusion
- “Compliance” issues
- Placement issues
- Suicide detection and prevention

End of Life Support
- Knowledge of Cardiopulmonary Resuscitation (CPR), artificial methods of feeding and ventilation
APPENDIX 1

Family Caregiver Support Program Nursing Referral Form

Date: ____________________________________

Care Manager Name: _________________________    Telephone: _____________________

Caregiver Name: ____________________________    Telephone: _____________________

Address: _________________________________________   Best time to call: __________

Reason for Referral (check all that apply)

Does CG live with CR   ☐ Yes   ☐ No

☐ Carerecipient frequently hospitalized within a short period of time or frequent ER visits.

Caregivers who:
☐ have no health insurance
☐ have not had medical care
☐ have a chronic illness
   ☐ diabetes
   ☐ hypertension
   ☐ other (please indicate)
☐ have an unstable health condition & need follow-up
☐ need health education re:
   ☐ body mechanics
   ☐ diet for diabetes, weight loss, or blood pressure
   ☐ managing skin care (pressure ulcers)
   ☐ smoking cessation
   ☐ stress management / high Zarit score
   ☐ relaxation techniques
☐ require medical information concerning end of life issues re: peg tube, ventilator, etc.
☐ have difficulty with medication management and need medication information for self and/or carerecipient.
☐ have difficulty navigating the medical system.
☐ are feeling depressed; hopeless, anxious.
☐ have difficulty, frustration managing carerecipient’s symptoms or behavior.

Other reasons not listed ______________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Family Caregiver Support Program Nursing Assessment Form

CG Name: __________________________________________ DOB: ____________
Reason for referral: ____________________________________ Date: ____________
Number of years caregiving: __________ Works outside home  ❑ Yes ❑ No
CR Name: ________________________________________ DOB: ______________
Diagnoses of CR: ______________________________________________________
Medications: _________________________________________________________
CR:
- Bedbound  ❑ Yes ❑ No
- At risk for pressure ulcers  ❑ Yes ❑ No
- Incontinent urine  ❑ Yes ❑ No
- Foley  ❑ Yes ❑ No
- Up during night  ❑ Yes ❑ No
- Number of hours alone/day
- Peg Tube  ❑ Yes ❑ No
- Cognitively impaired  ❑ Yes ❑ No
- Actual pressure ulcers  ❑ Yes ❑ No
- Incontinent bowel  ❑ Yes ❑ No
- Colostomy  ❑ Yes ❑ No
- Number of times up/night
- Other assistance
Caregiver Support:
- Family physician: _____________________________ Telephone: _______________
- Type of insurance: ___________________________ Prescription plan: ____________
- Access to health care/medication issues: _____________________________________________
- Date of last physician visit: ___________________________ Reason: _______________
- Gyn Services: ______________________  Mammogram: _______________  PAP: _____
- Recent Hospitalizations/ER visits: ___________________________________________________
- Counseling or Mental Health Services: _______________________________________________
- Alternatives Medicine Services: ___________________________________________________
- Prescriptions: _________________________________________________________________
- Allergies: ________________________________________________________________
- OTC/Herbs/Vitamins: ____________________________________________________________
- Method used for taking medications: _______________________________________________
- Height/Weight: ____________________ Do you want to gain or lose weight  ❑ Yes ❑ No
- Recent falls  ❑ Yes ❑ No
- Ambulatory device  ❑ Yes ❑ No
- PT/OT/ST  ❑ Yes ❑ No
- Appetite: ______________ Weight change in 3 months: ______________ Sleep habits: ______
- Bladder function: __________________________________________ Bowel habits: __________
- Time spent with CR: __________________________________________ Time for self: ___________
APPENDIX 2 (CONT.)

Degree of stress in caregiving:  □ small  □ moderate  □ significant
Impact of caregiving on health:  □ small  □ moderate  □ significant
Financial stress:  □ small  □ moderate  □ significant
Responsible for the caregiving of:  □ children  □ grandchildren  □ other family
Rate pain 1, 2, 3, 4, 5, 6, 7, 8, 9, 10 (circle)  Site(s) ______________________
Rate energy level 1, 2, 3, 4, 5, 6, 7, 8, 9, 10 (circle)  Smoking _________________
Recent back injury: _________________________________________________________
What kinds of care do you feel most comfortable performing? ______________________
What kinds of care do you feel you need help in performing? _________________________
__________________________________________________________________________
What aspect of being a CG gives you the most stress? _____________________________
How do you exhibit stress? (physical symptoms, emotional outbursts, etc.) ____________
How do you relieve your stress? _____________________________________________

Review of Systems

Skin__________________________________________________________
Eyes/Ears/Nose/Throat ____________________________________________
Cardiac________________________________________________________
Pulmonary _____________________________________________________
Urinary _______________________________________________________
GI ___________________________________________________________
Muscular-Skeletal ________________________________________________
Neurological ____________________________________________________

Vital Signs:
Temp _______ Pulse _______ Resp _______ BP ___________
Pulse Ox __________

Assessment_____________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
## APPENDIX 3

Family Caregiver Support Program Nursing Care Plan Form

<table>
<thead>
<tr>
<th>DATE</th>
<th>ISSUE IDENTIFIED</th>
<th>INTERVENTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Disease Education:</strong></td>
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<tr>
<td></td>
<td>___ Hypertension</td>
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<td></td>
<td>___ CHF</td>
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<td></td>
<td>___ Diabetes</td>
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<td>___ OA; RA</td>
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<td></td>
<td>___ Obesity</td>
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<td></td>
<td>___ Hypercholesterolemia</td>
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<td></td>
<td>___ Depression</td>
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<td></td>
<td>___ Incontinence</td>
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<td></td>
<td>___ Other: _____________</td>
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<tr>
<td></td>
<td><strong>Disease Management:</strong></td>
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<td></td>
<td>___ BP monitoring</td>
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<td></td>
<td>___ Glucose monitoring</td>
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<td></td>
<td>___ Medication desired/untoward effects, dose</td>
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<tr>
<td></td>
<td>___ Symptoms: constipation, pain</td>
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<td></td>
<td>___ HIV disease and prevention</td>
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<td></td>
<td>___ Pressure ulcer prevention and treatment</td>
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<td>___ Smoking cessation</td>
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<td></td>
<td>___ Weight loss management</td>
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<tr>
<td></td>
<td>___ Back injury prevention/treatment</td>
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<td></td>
<td>___ Preventative care for bed bound individuals</td>
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<tr>
<td></td>
<td>___ Home management of COPD/asthma</td>
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<td></td>
<td>___ Other: _____________</td>
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<tr>
<td></td>
<td><strong>Protocols:</strong></td>
<td></td>
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<tr>
<td></td>
<td>___ Incontinence</td>
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<tr>
<td></td>
<td>___ Impaired mobility/falls</td>
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<td></td>
<td>___ Adverse Drugs/Symptom Self Care</td>
<td></td>
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<tr>
<td></td>
<td>___ Pain</td>
<td></td>
</tr>
</tbody>
</table>

Anticipated Visit Pattern__________________________________________________

Notes_______________________________________________________________
___________________________________________________________________
___________________________________________________________________

INTEGRATING NURSING INTERVENTION WITH SOCIAL WORK SERVICES
Philadelphia Corporation for Aging (PCA), a private, non-profit Area Agency on Aging, was established in 1973 to coordinate social services for Philadelphians who are older or who have disabilities and to assist them in achieving optimum levels of health, independence, and productivity. One of the region’s largest non-profit organizations, PCA is funded in part by the federal Older Americans Act, Medical Assistance, and the Pennsylvania Lottery, all channeled through the Pennsylvania Department of Aging.