



Australian Government

Department of Education, Employment and Workplace Relations

CHCCM402E Establish and monitor a case plan

Release: 1

CHCCM402E Establish and monitor a case plan

Modification History

CHC08 Version 3	CHC08 Version 4	Comments
CHCCM402D Establish and monitor a case plan	CHCCM402E Establish and monitor a case plan	ISC upgrade changes to remove references to old OHS legislation and replace with references to new WHS legislation. No change to competency outcome.

Unit Descriptor

Descriptor

This unit describes the knowledge and skills required to develop a case management plan to address specific client needs

Application of the Unit

Application

This unit may apply to work in a range of community service contexts

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

Employability Skills Information

Employability Skills

This unit contains Employability Skills

Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Terms in italics are elaborated in the Range Statement.

Elements and Performance Criteria

ELEMENT

PERFORMANCE CRITERIA

1. Develop a case management plan

- 1.1 Assess client needs in accordance with organisation procedures
- 1.2 Collect *information* on a range of suitable interventions to address immediate, short and longer term needs of clients
- 1.3 Undertake appropriate consultation with stakeholders to ensure issues and options for their resolution are explored thoroughly
- 1.4 Negotiate and agree common goals, objectives and processes with clients and stakeholders to ensure needs are addressed with statutory and organisation frameworks
- 1.5 Explore a full range of options for addressing client and stakeholder needs and include in case management plan
- 1.6 Ensure processes for monitoring achievement of goals, timeframes and resourcing are agreed in the planning stage
- 1.7 Define roles, responsibilities and accountabilities for clients, stakeholders, workers and service providers
- 1.8 Negotiate and agree processes for appeal and for the termination and/or renegotiation of intervention and include in the plan
- 1.9 Identify relevant family, community, cultural and ideological *considerations* and address in the case plan

ELEMENT**PERFORMANCE CRITERIA****2. Define plan implementation procedures**

- 2.1 Implement practical arrangements to support clients and stakeholders
- 2.2 Define negotiable and non negotiable aspects of the intervention and implement processes to ensure they are maintained
- 2.3 Negotiate and agree ongoing case management processes with clients and stakeholders
- 2.4 Where appropriate, develop and agree contracts with external service providers and accurately reflect timing and resourcing constraints
- 2.5 Implement procedures to ensure information sharing between key stakeholders is facilitated
- 2.6 Implement procedures to ensure progress of specialist client service delivery is monitored in accordance with agreed procedures, against defined performance indicators
- 2.7 Define, and implement where necessary, *procedures to deal with crisis situations*

3. Establish review and evaluation systems

- 3.1 Negotiate case plan with supervisor
- 3.2 Set up appropriate evaluation processes for ongoing implementation of the plan
- 3.3 Complete all relevant reporting procedures in accordance with organisation requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This describes the essential skills and knowledge and their level required for this unit.

Essential knowledge:

The candidate must be able to demonstrate essential knowledge required to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include knowledge of:

- Relevant policy, procedures and legislation and statutory requirements related to the area of work
- Cultural protocols and systems
- Family structure, dynamics, communication and decision-making
- Family support and family casework strategies
- Range of community services and resources available
- Indicators of abuse and accepted intervention strategies
- Effects of abuse on human development
- Effects of different forms of intervention
- Effects of incarceration

Essential skills:

It is critical that the candidate demonstrate the ability to:

- Interpret and apply legislation, policies and procedures
- Respond to and manage crisis
- Develop and assess actions appropriate for intervention
- Collect and assess information
- Document plans

In addition, the candidate must be able to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include the ability to:

- Develop and maintain appropriate networks
- Demonstrate application of skills in:
 - operational planning processes

REQUIRED SKILLS AND KNOWLEDGE

- report writing and documentation, including effective use of relevant information technology in line with work health and safety (WHS) guidelines
- stress management techniques
- verbal communication including interviewing skills, negotiation and cross cultural communication
- interpersonal relationships, including establishing and maintaining relationships and networks
- meeting procedures and facilitation

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate this unit of competency:

- The individual being assessed must provide evidence of specified essential knowledge as well as skills
- This unit of competence will be most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
- Assessment must include the normal range of workplace situations

EVIDENCE GUIDE

- Access and equity considerations:*
- All workers in community services should be aware of access, equity and human rights issues in relation to their own area of work
 - All workers should develop their ability to work in a culturally diverse environment
 - In recognition of particular issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on Aboriginal and Torres Strait Islander people
 - Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on Aboriginal and/or Torres Strait Islander clients and communities
- Context of and specific resources for assessment:*
- This unit can be assessed independently, however holistic assessment practice with other community services units of competency is encouraged
 - Resources required for assessment include access to:
 - an appropriate workplace where assessment can take place or simulation of realistic workplace setting
- Method of assessment:*
- Assessment may include observation, questioning and evidence gathered from the workplace environment
 - Workplace evidence can be testimonials, portfolios or copies of completed workplace records/ documentation

Range Statement

RANGE STATEMENT

The Range Statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Add any essential operating conditions that may be present with training and assessment depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts.

The contexts for establishing a case plan could include:

- Decision to implement an intervention
- A result of a notification
- A result of a court order
- A result of a contract to provide a service
- Part of a case planning meeting or conference where clients, their families of origin, carer families and service providers establish actions for the safety, well being and development of the client

Establishment of a case plan will be carried out within requirements established by:

- Commonwealth and state legislation
- Relevant international conventions
- Organisation policy and procedures
- Relevant program standards

Resources include:

- Training programs
- Staff, peers and specialist personnel
- Information and materials

Skill development includes:

- Life experience, vocational, social, recreational and personal skills

Information may include:

- All official documentation relating to client, full family history, developmental and medical history
- All available records, anecdotal material and individual interviews

RANGE STATEMENT

Considerations may include:

- Indigenous and ethnic considerations
- Power relationship structures
- Rituals, beliefs, hierarchies and practices
- Politics
- Gender

Procedures to deal with crisis situations include:

- Ensuring security and safety of all relevant parties including protection and custodial issues and the level of intervention required
- Appropriate crisis services such as counselling, respite care, debriefing

Unit Sector(s)

Not Applicable