



Australian Government

CHCCSM002 Implement case management practice

Release: 2

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Modification History

Release	Comments
Release 2	This version was released in <i>CHC Community Services Training Package release 3.0</i> and meets the requirements of the 2012 Standards for Training Packages. Removal of Duplicate performance criteria. Equivalent outcome
Release 1	This version was released in <i>CHC Community Services Training Package release 2.0</i> and meets the requirements of the 2012 Standards for Training Packages. Significant changes to performance criteria New evidence requirements for assessment including volume and frequency requirements Significant changes to knowledge evidence

Application

This unit describes the skills and knowledge required to develop and implement an action plan for complex case management based on existing goal directed plans that address predetermined needs.

Workers at this level will demonstrate autonomy, well-developed judgement, adaptability and responsibility and are typically already experienced in working intensively with clients requiring support.

This unit applies to work in a range of health and community service sector contexts.

The skills in this unit must be applied in accordance with Commonwealth and State/Territory legislation, Australian/New Zealand standards and industry codes of practice.

Elements and Performance Criteria

ELEMENT

PERFORMANCE CRITERIA

Elements define the essential outcomes.

Performance criteria specify the level of performance needed to demonstrate achievement of the element.

1. Initiate complex case management process

1.1 Confirm eligibility of client for case management and match their profile against service eligibility criteria

1.2 Inform the client of all rights and responsibilities and

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obtain client's consent to involvement in case management

1.3 Collect information about the client, maintain confidentiality and privacy and minimise any duplication

1.4 Work with the client to confirm and prioritise needs and to pursue relevant, achievable and time-framed goals

1.5 Recognise and respect the client's right to self-determination within legal parameters

1.6 Identify social, economic, housing, personal and family factors that may influence the client's health, well being and level of independence

1.7 Discuss the case management process with the client, the complaint and appeal processes and the service criteria for exit

1.8 Ascertain specific cultural needs of the client to provide appropriate services and support for their development

1.9 Estimate the level of case management support required to implement the client's plan and discuss with all relevant parties

2. Identify and consider possible solutions to complex issues

2.1 Identify complex legal and ethical issues and questions about aspects of case management and resolve in line with organisation guidelines and regulatory requirements or seek appropriate resources

2.2 Identify complex issues relating to funding of service provision and administer resources within relevant regulatory framework

2.3 Ensure ethical standards are addressed to protect the autonomy, dignity, privacy and rights of the client

2.4 Advocate for client-centred solutions to complex identified needs at service delivery and policy-making levels

2.5 Collaborate with colleagues, professionals and between services as needed to meet client's needs, achieve goals and to optimise outcomes

2.6 Maintain up-to-date knowledge of, and links with,

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available resources and services within the community

3. Develop plan of action to address identified priorities

3.1 Use client identified goals and needs assessment to develop and agree on a plan of action

3.2 Support and develop the client's ability to independently access alternative resources to address needs

3.3 Conduct research to establish an informed plan of action

3.4 Evaluate any barriers that may restrict the client's ability to meet identified goals and determine strategies to minimise their impact

3.5 Plan actions that are within client's financial resources

3.6 Convene and/or participate in case conferences with services providers and/or family, carers, natural supports and relevant others

3.7 Seek and obtain the client's consent to undertake any referrals to other services and/or organisations

3.8 Provide the client with timely information about available service options and support them to make informed decisions and exercise choice in all stages of the case management process

3.9 Document the client's goals and determine how effectiveness of interventions will be measured and evaluated

4. Monitor service provision and coordination

4.1 Communicate with service providers to discuss the case management plan, identify problems and adjust as necessary

4.2 Advocate for service system improvements and identify and communicate gaps and/or inadequate services to program managers

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4.3 Make adjustments to services, supports and resources according to client's needs and financial parameters

4.4 Document and report to relevant organisation or funding body the implications from any variations to expected plan

5. Evaluate client outcomes

5.1 Undertake periodic reassessment and evaluation of outcomes against expected outcome

5.2 Obtain information from clients, service providers, funding bodies and case managers to determine progress and evaluate against identified goals in the plan

5.3 Evaluate the effectiveness of plan adjustments to address client's ongoing situation and changing needs

5.4 Evaluate the effectiveness of case management processes and service delivery, including client satisfaction and costs against benefits

5.5 Work with the client to evaluate ongoing support needs to meet their goals, including review of parameters for disengagement

5.6 Evaluate financial outcomes of adjustments to plan

5.7 Identify opportunities for the client to maintain or develop independence from any aspect of the plan

5.8 Document and report client outcomes and satisfaction in accordance with organisation requirements

Foundation Skills

The Foundation Skills describe those required skills (language, literacy, numeracy and employment skills) that are essential to performance.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5e0c25cc-3d9d-4b43-80d3-bd22cc4f1e53>

Assessment Requirements for CHCCSM002 Implement case management practice

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Performance Evidence

The candidate must show evidence of the ability to complete tasks outlined in elements and performance criteria of this unit, manage tasks and manage contingencies in the context of the job role. There must be evidence that the candidate has:

- implemented case management practice for 3 complex cases involving people with a diverse range of issues, goals and barriers

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge required to effectively complete tasks outlined in elements and performance criteria of this unit, manage tasks and manage contingencies in the context of the work role. This includes knowledge of:

- case management practice and approaches, including:
 - client-centred
 - evidence-based
 - holistic
 - inclusive
 - strength-based
- case management models and practices literature and current literature in area of practice
- current national standards for practice of case management

- wide range of services and resources available to clients
- components of service delivery system
- funding processes and bodies related to provision of relevant services and resources
- characteristics and needs of identified client population
- nature and significance of service setting
- legal and ethical considerations relevant to case management and how these are applied in organisations and individual practice:
 - professional standards
 - code of ethics
 - duty of care
 - voluntary assumption of risk
 - informed consent
 - privacy, confidentiality and disclosure
 - mandatory reporting
- documentation requirements and practices
- complex case management processes, including:
 - complexity of client circumstances or needs
 - complex range of issues involved in addressing client needs
 - involvement of multiple service providers
 - longevity of case management process
 - family relationship problems
 - 1 or more of the following issues; social, economic, housing and health
- complex client needs, including:
 - needs requiring multiple service types with heightened needs for collaboration between service providers
 - a range of needs that may not be met by currently available services and resources
 - family and/or carer needs that require additional services
 - unstable health conditions
 - housing and/or financial problems
 - alcohol and/or drug use
- barriers that may restrict client's ability to meet identified goals, including:
 - physical, mental or emotional issues or events
 - legal or regulatory constraints
 - incidents or accidents
 - cultural issues
 - service provider issues
 - eligibility criteria
 - housing
 - financial problems
 - alcohol and/or drug use

- health

Assessment Conditions

Skills must have been demonstrated in the workplace or in a simulated environment that reflects workplace conditions. The following conditions must be met for this unit:

- use of suitable facilities, equipment and resources, including individualised case management plans
- modelling of industry operating conditions, including:
 - scenarios that reflect standard operating conditions and contingencies
 - links to other local service agencies or organisations

Assessors must satisfy the Standards for Registered Training Organisations (RTOs) 2015/AQTF mandatory competency requirements for assessors.

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