



Australian Government

CHCCSM008 Undertake advanced client assessment

Release: 1

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Modification History

Release	Comments
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 undertake initial and ongoing client assessments, to determine eligibility, priority and need for services as part of a case management process or as part of an assessment service.

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 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. Prepare for initial assessment

1.1 Prepare for broad-based holistic assessment of the client's needs based on referral or other documentation in line with organisation policy and procedures

1.2 Establish rapport with client and obtain their consent to participate in the assessment process

1.3 Identify additional stakeholders, including carers, natural supports and/or family members, whose input will

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assist the client in assessment process and outcomes

1.4 Identify the range of information, products and resources to be utilised in the assessment process

1.5 Work with the client to collaboratively identify opportunities to build on strengths, improve functional capacity, and participate in social and community activities

1.6 Organise appropriate time and place for assessment in conjunction with the client and carers, support workers and/or family

1.7 Identify and agree on appropriate assessment tools and processes according to organisation policy and procedures

1.8 Explain privacy and confidentiality principles, practices and procedures

1.9 Access and brief interpreter or cultural specific workers

2. Conduct assessment

2.1 Communicate with all people involved in the assessment in a language or form they understand

2.2 Clearly explain the assessment process and how information is used, including legal requirements and organisation policy and processes for mandatory reporting

2.3 Implement risk assessment processes and stratify risks to determine interventions based on client circumstances, needs and interests

2.4 Involve the client, their carers, natural supports, and/or family in the assessment process in a way that empowers the client and is in accordance with the client's preferences

2.5 Use appropriate assessment tools and processes to identify, clarify and prioritise complex or multiple needs of the client, their carers and/or family

2.6 Collect and document information about the client, according to organisation requirements

2.7 Collaborate with stakeholders and service providers

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to avoid duplication experienced by the client and to share information and resources

2.8 Assist those involved in the assessment to identify and prioritise the client's goals, needs and any risk factors

2.9 Where carers and/or families are involved, ensure the assessment focuses on, and strengthens the relationship, rather than treat the individual in isolation

2.10 Inform carers and/or family about their role and rights in the assessment and decision-making processes, including their right to an assessment of their own needs

2.11 Identify and assess work health and safety (WHS) risks and issues potentially associated with service and resource delivery

2.12 Implement risk management processes to maintain safety of client and others involved in the assessment, including workers

3. Respond appropriately to diversity

3.1 Use assessment processes and practices designed to build trust and confidence to work with mainstream services

3.2 Use assessment processes that are non-discriminatory and appropriate for each distinct but potentially overlapping population

3.3 Provide equitable access and culturally competent assessment processes for culturally and linguistically diverse (CALD) and Aboriginal and/or Torres Strait Islander people

3.4 Provide appropriate interpreter support according to organisation protocols

3.5 Where appropriate, build and maintain relationships with ethno-specific and multicultural organisations

3.6 Where appropriate, build and maintain relationships with Aboriginal and/or Torres Strait Islander communities and organisations and involve representatives in the assessment processes

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4. Respond appropriately to people with different levels of needs, including people with complex needs

- 4.1 Support people with complex needs and circumstances and facilitate access to assessment
- 4.2 Develop and maintain inter-organisation relationships and agreements to address the client, family and/or carer needs
- 4.3 Recognise the need for secondary consultation, medication administration and monitoring or additional specialist assessment, including those undertaken by a specified health professional
- 4.4 Identify and refer when the client's health is unstable to ensure the appropriate multi-disciplinary approach is applied
- 4.5 Identify and build on the client's motivation to improve their functional capacity and set their own goals

5. Undertake ongoing assessment and review

- 5.1 Respond appropriately to informal monitoring of health and well being of all parties involved in the assessment processes
- 5.2 Undertake regular and systematic reviews to ensure assessed needs of clients are addressed effectively
- 5.3 Use regular reviews to re-prioritise client needs for service and to ensure equitable access based on ongoing appraisal of prioritised needs
- 5.4 Undertake reassessment of the client's needs as specified in the client's plan or as required by personal circumstances or changes in client or carer health
- 5.5 Maintain communication with all parties and document and report throughout processes, according to organisation protocols

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 CHCCSM008 Undertake advanced client assessment

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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:

- undertaken broad-based assessments of 3 clients, including:
 - involving their carers, natural supports and/or family members in accordance with client preferences
 - maintaining a focus on service delivery within the community sector to optimise their functional capacity and participation in social, community and daily living activities
- responded to the requirements of 3 people presenting with high level needs or complex circumstances, including:
 - making evidence-based judgments about the person's needs
 - selecting appropriate internal and external services that match the client's needs
 - collaborating with multi-disciplinary team
 - determining and implementing referral requirements

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:

- roles, responsibilities and boundaries of own work role and of other organisations and personnel providing assessment and related services
- validity and reliability requirements for assessment

- client risk assessment and risk stratification
- assessment tools, processes and protocol requirements
- appropriate assessment tool to determine developmental status, family, housing, financial situation, natural supports, health, social relationships, ability to undertake activities of daily living, cognitive capacity and relevant issues or concerns
- assessment approaches and practices related to identifying needs for delivery of services and resources in the community sector
- organisation policy and procedure associated with individual assessment
- processes applying to multi-organisation assessments and relevant inter-organisation relationships and agreements
- reporting requirements of individual assessment
- consent requirements for dissemination of a client's assessment results and associated privacy and confidentiality principles and practices
- aspects of human development theories throughout the lifespan, including:
 - physical
 - psychological
 - cognitive
 - social
 - affective
- client development status
- characteristics and needs of identified client population
- policy and planning context and systems of funding and providing services
- professional standards and code of ethics
- government legislation, regulations, standards and policies
- own values and how they relate to organisation requirements and clients
- documentation requirements and practices
- current research in assessment practice
- work health and safety (WHS), risks, issues and associated risk management practices and how to assess these
- strategies to provide equitable access and culturally competent assessment processes for culturally and linguistically diverse people (CALD); Aboriginal and/or Torres Strait Islander people and lesbian, gay, bi-sexual, transgender and intersex (LGBTI)
- relevant ethno-specific, multicultural and Aboriginal and/or Torres Strait Islander organisations and their role in linking within the service system
- accurate and non-discriminatory information about the health risks and assessment procedures that are appropriate for each distinct but potentially overlapping population
- the significance of setting, including working in the client's home

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 plans

- modelling of industry operating conditions, including:
 - scenarios that reflect standard operating conditions and contingencies
 - links to other local service agencies or organisations
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Assessors must satisfy the Standards for Registered Training Organisations (RTOs) 2015/AQTF mandatory competency requirements for assessors.

Links

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