



Australian Government

Department of Education, Employment and Workplace Relations

CHCCM503C Develop, facilitate and monitor all aspects of case management

Release: 1

CHCCM503C Develop, facilitate and monitor all aspects of case management

Modification History

Not Applicable

Unit Descriptor

Descriptor

This unit describes the knowledge and skills required to facilitate all aspects of case planning

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. Conduct case management meetings

- 1.1 Facilitate information sharing with the client by establishing an appropriate rapport with the client and implementing appropriate procedures including:
- establish purpose, objectives and agenda of the meeting
 - facilitate discussion
 - resolve conflict where relevant
 - identify, negotiate and record outcomes
- 1.2 Identify and agree boundaries and processes within service delivery, including:
- rights, roles, responsibilities, decision-making processes, accountability and outcomes
 - ways of addressing experience, skills, values and development of participant
 - impact of statutory mandates on interventions, the client and significant others
 - the impact of value systems of worker, client and key stakeholders on outcomes
 - information sharing and planning
 - appropriate conflict resolution techniques to be employed
- 1.3 Define and explore individual family and community needs and rights, and organisation responsibilities to assure the rights are protected for all concerned

2. Develop an appropriate approach to case management

- 2.1 Develop and utilise case management processes appropriate to implementing statutory requirements
- 2.2 Implement appropriate processes to facilitate client setting of goals and participation in case management processes
- 2.3 Integrate appropriate cultural considerations into all aspects of case management planning
- 2.4 Provide information on rights of appeal and avenues of complaint so client understands their rights

ELEMENT**PERFORMANCE CRITERIA****3. Develop an appropriate case management plan**

- 3.1 Develop a case management plan to reflect initial assessment of needs
- 3.2 Identify the full range of appropriate immediate, short and long term needs of the client and other relevant parties
- 3.3 Develop action plans to reflect:
- integration of expertise of relevant stakeholders and other service deliverers
 - negotiated and agreed goals and operational processes
 - a range of strategies to address each goal and to maximise participation in plan
 - appropriate resource allocation
 - agreed responsibility for delivery
 - realistic and agreed indicators of success
 - rights and responsibilities of client
- 3.4 Establish processes for monitoring and changing case plan
- 3.5 Identify strategies to deal with *complex or high risk situations*
- 3.6 Match requirements of case plan to experience, workload and geographical location of worker
- 3.7 Focus plan on assisting clients to set and achieve realistic targets for change or action and to take personal responsibility

ELEMENT**PERFORMANCE CRITERIA****4. Manage case work activities and processes**

- 4.1 Implement strategies to continually monitor the effectiveness of case management processes against agreed goals, relevant services and programs, client and stakeholder satisfaction
- 4.2 Assess the need for changes in case plan, including the need for ongoing intervention, and develop strategies for alternatives as appropriate
- 4.3 Successfully negotiate with relevant parties, any proposed changes arising from case review
- 4.4 Utilise processes for case closure as appropriate, to comply with organisation procedures

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:

- Behaviour change models and practices
- Organisation procedures and standards
- Formal meeting processes
- Relevant policy, procedures, legislation and statutory mandates
- Cultural protocols and systems
- Family structure, dynamics, communication and decision-making
- Relevant documentation protocols
- Range of available services

Essential skills:

It is critical that the candidate demonstrate the ability to:

- Access and use a range of family and community resources
- Identify and gain agreement on role boundaries

REQUIRED SKILLS AND KNOWLEDGE

- Facilitate groups and support participants to engage in information sharing and planning
- Apply organisation statutory and legislative requirements

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:

- Demonstrate application of skills in:
 - Planning, decision-making and goal setting
 - Managing group dynamics
 - Conflict resolution, negotiation and (where required) mediation techniques
 - Defining boundaries
 - Planning and goal setting
 - Facilitation
 - Assertion
 - High level writing skills
 - Interpersonal and communication
 - Supervision and delegation where appropriate to job role

REQUIRED SKILLS AND KNOWLEDGE

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 may be conducted over one or more occasions and should include all aspects of case planning with a range of clients

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

EVIDENCE GUIDE

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

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 facilitation of information sharing and planning include:

- All formal processes included in case management e.g. case conferences, case review meetings, formal briefings on client progress

RANGE STATEMENT

Evaluating ongoing

implementation includes:

- Monitoring case plan implementation
- Facilitating review activities and feedback from workers on progress of intervention
- Liaison with service providers, clients, significant others
- Advising on how case plans can be modified, ensuring that changes are communicated appropriately

Complex or high risk situations

are to be defined as:

- Life threatening/high risk situations
- Cases where at least three of the following factors are combined:
 - serious/sustained abuse
 - multiple difficulties present in family
 - intellectual or psychiatric disability
 - chronic and serious drug addiction affecting individuals capacity
- Where a wide range of other agencies are involved, e.g. community services, legal, medical and police agencies
- Where involvement of protective and custodial agencies with the family has been over a lengthy and sustained period
- When age of the client creates special considerations
- Cases with high public/political sensitivity requiring sensitive and experienced case investigation and management

Negotiate actions includes:

- Gaining agreement on course of actions, goal setting, milestone setting and agreement, timeline setting, establishment of review points in case plan

Unit Sector(s)

Not Applicable