

Unit mapping

KQ: Knowledge questions

KQ

PA

PA: Practical assessment – Task (T), Workplace Skills (WS)

Elements and performance criteria

E 1 Initiate case management process

PC 1.1	Confirm eligibility of person for case management and match their profile against service eligibility criteria	Q 1.1 Q 1.2	T 1b T 1d
PC 1.2	Inform the person of all rights and responsibilities and obtain person's consent to involvement in case management	Q 1.4 Q 1.5	T 2a T 2b T 2f
PC 1.3	Collect information about the person, maintain confidentiality and privacy, and minimise duplication	Q 1.7 Q 1.8	T1b T3b,f T4a
PC 1.4	Prioritise person-centred and strengths-based needs and pursue relevant, achievable time-framed goals	Q 1.9 Q 1.10	T 3b-e
PC 1.5	Ascertain specific cultural needs of the person to provide appropriate services and support for their development	Q 1.11	T 1c
PC 1.6	Recognise and respect the person's right to self-determination within legal parameters	Q 1.12	T 3c
PC 1.7	Identify social, economic, housing, personal and family factors that may influence the persons health, wellbeing, and level of independence	Q 1.13 Q 1.14	T 2c
PC 1.8	Discuss with the person the case management process, the complaints and appeals processes and the service criteria for exit	Q 1.15 Q 1.16 Q 1.17	T 2b
PC 1.9	Estimate the level of case management support required to implement the person's plan and discuss with all relevant parties with the person's consent	Q 1.18	T 1b T 1d

E 2 Identify and consider possible solutions to complex issues

PC 2.1	Identify ethical issues and questions about aspects of case management and resolve in line with organisational guidelines and regulatory requirements	Q 2.1 Q 2.2a Q 2.2b	T 3a-c
PC 2.2	Identify complex issues relating to funding of service provision and administer resources within relevant regulatory framework	Q 2.3 Q 2.4	T 3a
PC 2.3	Apply ethical practices to uphold autonomy, dignity, privacy and rights of the person	Q 2.5	T 3a-c
PC 2.4	Advocate for person-centred solutions to complex identified needs at service delivery and policy-making levels	Q 2.6	T 3d
PC 2.5	Collaborate with others to meet person's needs, achieve goals and optimise outcomes	Q 2.7	T 3e T 3f T 4a T 4d

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E 3 Develop plan of action to address identified priorities

PC 3.1	Use person's identified goals and needs assessment to develop and agree on a plan of action	Q 3.1	T 4i
PC 3.2	Support and develop the person's ability to independently access alternative resources to address needs	Q 3.2	T 4f
PC 3.3	Conduct research to establish an informed plan of action	Q 3.3a Q 3.3b	T 4a T 4c-e
PC 3.4	Address barriers that may restrict the person's ability to meet identified goals and determine strategies to minimise their impact	Q 1.13 Q 3.4 Q 3.5	T 1c T 4e
PC 3.5	Plan actions that are within person's financial resources	Q 3.6	T 4i
PC 3.6	Convene and participate in case conferences with the person, service providers, family, carers, natural supports and others identified by the person	Q 3.7	T 3f T 4d
PC 3.7	Seek and obtain the person's consent to undertake any referrals to other services and organisations	Q 3.8	T 4g
PC 3.8	Provide the person 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	Q 3.9a Q 3.9b Q 3.10	T 4h
PC 3.9	Document the person's goals and determine how effectiveness of interventions will be measured and evaluated	Q 3.11	T 4c T 4i

E 4 Monitor service provision and coordination

PC 4.1	Communicate with service providers to review the individualised case management plan and adjust to optimise outcomes	Q 4.1	T 5b T 5f T 5g
PC 4.2	Advocate for service system improvements and identify and communicate gaps and inadequate services to program managers	Q 4.2	T 5g T 5h
PC 4.3	Adjust services, supports and resources according to person's needs and financial parameters	Q 4.3	T 5c T 5d
PC 4.4	Document and report to relevant organisation or funding body the implications from any variations to expected plan	Q 4.4	T 5d T 5e

E 5 Evaluate outcomes

PC 5.1	Undertake periodic reassessment and evaluation of outcomes against expected outcome	Q 5.1 Q 5.2	T 5c T 5f T 5m
PC 5.2	Obtain information from person, service providers, funding bodies and case managers to determine progress and evaluate against identified goals in the plan	Q 5.3	T 5k
PC 5.3	Evaluate the effectiveness of plan adjustments to address person's ongoing situation and changing needs	Q 5.4	T 5f T 5i
PC 5.4	Evaluate the effectiveness of case management processes and service delivery, including person's satisfaction and costs against benefits	Q 5.5	T 5a T 5b
PC 5.5	Work with the person to evaluate ongoing support needs to meet their goals, including review of parameters for disengagement	Q 5.6	T 5j-l
PC 5.6	Evaluate financial outcomes of adjustments to plan	Q 5.7	T 5c
PC 5.7	Identify opportunities for the person to maintain or develop independence from any aspect of the plan	Q 5.8	T 5l
PC 5.8	Document and report person's outcomes and satisfaction in accordance with organisational policies and procedures	Q 5.9	T 5i T 5m

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Knowledge evidence			
KE 1	Case management practice and approaches:	Q 1.2	T 1
	▪ person-centred	Q 1.10	WS 1
		Q 2.6	WS 2
			WS 3
	▪ evidence-based	Q 1.2	
	▪ holistic	Q 1.2	
	▪ inclusive	Q 1.2	
	▪ strengths-based	Q 1.2	
		Q 1.10	
KE 2	Contemporary case management models and practices	Q 1.3	T1
			WS 1
			WS 2
			WS 3
KE 3	Current national standards for practice of case management	Q 1.6	WS 4
KE 4	Wide range of services and resources available for case management	Q 1.6	
		Q 3.2	
		Q 3.10	
KE 5	Components of service delivery system	Q 1.1	
		Q 1.2	
		Q 1.3	
		Q 1.10	
		Q 2.5	
		Q 3.1	
		Q 3.5	
		Q 4.1	
		Q 4.2	
KE 6	Funding processes and bodies related to provision of relevant services and resources	Q 2.3	
		Q 2.4	
		Q 4.4	
KE 7	Characteristics and needs of identified population	Q 1.2	
		Q 1.11	
		Q 2.6	
KE 8	Nature and significance of service setting	Q 1.2	
		Q 1.11	

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KE 9	Legal and ethical considerations relevant to case management and how these are applied in organisations and individual practice:		T 3 WS 4
	▪ professional standards	Q 2.5	
	▪ code of ethics	Q 2.1 Q 2.5	
	▪ duty of care	Q 1.12	
	▪ voluntary assumption of risk	Q 2.2	
	▪ informed consent	Q 1.15 Q 3.8	
	▪ privacy, confidentiality and disclosure	Q 1.7 Q 1.15 Q 2.5	T 2 T 3
	▪ mandatory reporting	Q 1.12	
KE 10	Documentation requirements and practices	Q 3.11 Q 4.4 Q 5.9	
KE 11	Resources and services available within the community	Q 1.13 Q 1.18 Q 3.2	
KE 12	Case management processes:		WS 3
	▪ complexity of person’s circumstances or needs	Q 1.1 Q 1.2 Q 1.13 Q 1.14 Q 3.5 Q 3.8 Q 5.6	
	▪ complex range of issues involved in addressing person’s needs	Q 1.13 Q 1.14	
	▪ involvement of multiple service providers	Q 1.14 Q 1.15 Q 2.7 Q 3.5	
	▪ longevity of case management process	Q 1.15 Q 1.17 Q 5.6	

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KE 13	Factors contributing to complex needs:	Q 1.14	WS 3 WS 5
	▪ available services and collaboration requirements between service providers		
	▪ needs that may not be met by currently available services and resources	Q 1.13 Q 1.14	
	▪ family and carer needs that require additional services	Q 1.14	
	▪ health conditions		
KE 14	Barriers that may restrict person's ability to meet identified goals:		WS 3 WS 5
	▪ physical and mental health and wellbeing	Q 1.13 Q 1.14 Q 3.5	
	▪ impacts of trauma	Q 1.14 Q 3.5	
	▪ legal or regulatory constraints	Q 1.13	
	▪ incidents or accidents	Q 1.13 Q 1.14 Q 3.5	
	▪ cultural barriers	Q 1.11 Q 1.13 Q 3.5	
	▪ service provider issues	Q 1.14 Q 3.5	
	▪ eligibility criteria	Q 1.1 Q 1.14 Q 1.15	
	▪ housing	Q 1.13 Q 1.14 Q 3.5	
	▪ financial problems	Q 1.13 Q 3.5	
KE 15	Factors contributing to complex needs:	Q 1.13 Q 1.14	
	▪ alcohol and drug use		
KE 16	Barriers that may restrict person's ability to meet identified goals:	Q 1.13	
	▪ health	Q 1.13	

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Performance evidence

PE 1	Implement case management practice for three cases involving people with a diverse range of needs, goals and barriers	T 1-5
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Foundation skills

FS 1	Oral communication skills to: <ul style="list-style-type: none">participate in a variety of spoken exchanges with a range of audiences varying structure and language to suit the audience.	T 1a T 1b T 2a-f T 3d T 3f T 4d T 5b T 5h
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FS 2	Reading skills to: <ul style="list-style-type: none">interpret a variety of text to determine and confirm task requirements.	T 1a T 1b T 3a T 3b T 4e T 5a T 5m
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