



ASSESSOR GUIDE

CHCCSM005

Develop, facilitate and review all aspects of case management

Assessment 2 of 2

Case Studies



Assessment Instructions

Task overview

This assessment task is divided into 14 questions. Read each question carefully before typing your response in the space provided.

Additional resources and supporting documents

To complete this assessment, you will need:

- Learning resources.



Assessment Information

Submission

You are entitled to three (3) attempts to complete this assessment satisfactorily. Incomplete assessments will not be marked and will count as one of your three attempts.

All questions must be responded to correctly to be assessed as satisfactory for this assessment.

Answers must be typed into the space provided and submitted electronically via the LMS. Hand-written assessments will not be accepted unless previously arranged with your assessor.

Reasonable adjustment

Students may request a reasonable adjustment for assessment tasks.

Reasonable adjustment usually involves varying:

- the processes for conducting the assessment (e.g., allowing additional time)
- the evidence-gathering techniques (e.g., oral rather than written questioning, use of a scribe, modifications to equipment)

However, the evidence collected must allow the student to demonstrate all requirements of the unit.

Refer to the Student Handbook or contact your Trainer for further information.



Please consider the environment before printing this assessment.

Question 1

For each of the following statements, you must identify which stage of change you believe the client to be in and provide a brief response that you could give as their case manager to help encourage each client's participation in the case management process. You must ensure that your response is appropriate to the client's stage of change.

- a) From a client who has been court-mandated to attend your drug and alcohol service after being caught high-range drunk driving on three separate occasions: "I'm not sure why I'm even here; I don't have a drinking problem."

Assessor instructions: The student's response must identify the stage of change as pre-contemplation. Students must outline a response that is likely to encourage client participation in the case management process.

Stage of change:	(Approximate word count: 5 words) Pre-contemplation.
Response:	(Approximate word count: 40 - 45 words) Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example: Example response: "O.K. So from what I understand, you're saying that you don't think you have a problem. I'm concerned because the court has mandated you to attend, so they think you need treatment. What do you think about that?"

- b) From a client who has come into your domestic violence support organisation: "I don't want to be with him anymore – I don't want to keep being hit. I've tried to leave my husband before, but it was really hard – I had no money and nowhere to go – I ended up going back to him. I think I can do it this time, and I really want to; I just need to make sure that I'm better prepared."

Assessor instructions: The student's response must identify the stage of change as 'developing a plan.' Students must outline a response that is likely to encourage client participation in the case management process.

Stage of change:	(Approximate word count: 5 words) 'Developing a plan.'
Response:	(Approximate word count: 35 - 40 words) Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example. Example response: "It sounds like you're committed to making a change and that you've thought about

	those things that might make the process more achievable. What sorts of preparations do you think you need to make?"
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- c) From a long-term unemployed client referred to your employment support service: "I've been thinking about quitting drinking for a while now, but I'm just not sure how I'll cope being sober."

Assessor instructions: The student's response must identify the stage of change as 'contemplation.' Students must outline a response that is likely to encourage client participation in the case management process.

Stage of change:	(Approximate word count: 5 words) 'Contemplation'
Response:	(Approximate word count: 40 - 45 words) Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example. Example response: "It seems that you've put a lot of thought into the idea of quitting drinking but feel uncertain about the impact this change might have. Let's discuss some of the benefits and potential issues with making such a change".

Question 2

Clients have the right to complain if they are dissatisfied with any service delivery area. It is the case manager's responsibility to ensure that they clearly explain the potential avenues for making a complaint according to their organisation's procedures. Imagine that the information sheet your organisation distributes to clients (which reflects your organisation's policies and procedures) states:

Our Procedures for Receiving a Complaint

We respect your right to professional service. If you are unhappy with the service you receive, we have the following procedures in place to receive your complaint:

- Discuss the situation with your case manager so the matter can be dealt with promptly. If you want to support in making a complaint, ask someone you trust to accompany you. This may be a family member, carer, or advocate.
- If the situation is not settled at this level, you can put your complaint in writing and send it to the Centre Manager. We can provide you with some assistance with this if you need it.
- The Centre Manager will endeavour to resolve the complaint. If you are unhappy with this response, you have the right to present an Appeal to the Centre Director. Again, we can

provide you with some assistance with this if you need it.

- The Centre Director will make a final decision. If you are still unhappy with the response, you have the right to refer the matter to the Community Service Ombudsman.

Your organisation requires you to not only provide your clients with an information sheet but also to provide a brief verbal explanation of the complaints process during your first meeting with the client.

Write what you would say to a client during your initial meeting to explain their avenues of complaint and rights of appeal.

(Approximate word count: 145 - 155 words)

Assessor instructions: The student's response must demonstrate the ability to provide information on rights of appeal and avenues of complaint to ensure that the client understands their rights. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

"As your case manager, I need to let you know about your right to make a complaint. If, for some reason, you are not happy with any part of the service we provide, you are well within your right to make a complaint. You're welcome to talk directly with me about the complaint, but if you don't feel comfortable talking to me, or if the matter isn't resolved at this level, then you can put your complaint in writing and send it to the Centre Manager. If the matter isn't resolved at this point, then you have the right to present an appeal to the Centre Director. If needed, we can help you at any stage during this process. If you are unhappy with the Centre Director's decision, you have the right to discuss the matter with the Community Service Ombudsman".

Question 3

Imagine that you are a case manager working with Mary. Mary is a 25-year-old woman who has come to your organisation for support with mental health concerns (social anxiety). Mary tells you that she has a lot of trouble making friends. She discloses that she has tried to engage in social gatherings. However, she gets panic attacks and becomes too embarrassed to return. You have discussed all of the approaches with Mary, and together, you have decided that a strengths-based approach would be most appropriate.

Using a strengths-based approach, what are two (2) strategies you would use to support Mary within the case management process?

(Approximate word count: 70 - 75 words)

Assessor instructions: The student's response must identify two strengths-based approach to case management strategies they would use while working with Mary. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

- I would focus on building a positive working relationship with Mary to identify her strengths and celebrate past achievements (e.g., a time when she engaged with other people and did not have a panic attack).
- I would support Mary by helping her prepare for social interactions with others and build on things she has tried that have been successful for her in the past.

Question 4

Imagine that you are a case manager in a local employment agency. Several complaints have been made by clients in the last few months, raising some concerns within the agency that clients' rights may be violated as they are accessing services. You have been assigned to a team to ensure your agency promotes rights-based practice.

What are four (4) organisational policies and/or procedures your team should consider to ensure that the rights of clients are being upheld in all aspects of service delivery?

(Approximate word count: 95 - 100 words)

Assessor instructions: The student's response must identify four organisational policies and/or procedures that they would consider in their assessment and recommendations to ensure that the rights of clients are being upheld in all aspects of service delivery. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

- I would consider whether the organisation was aware of the obligations and rights set out in the Charter of Human Rights and Responsibilities.
- I would consider what resources were available to support human rights compliance.
- I would consider whether the organisation has policies and procedures in place to actively inform clients and other stakeholders of their rights and how to respond to rights-related complaints from clients.
- I would consider whether both management and staff have received training or professional development processes that include human rights, and if not, consider opportunities for implementing this.

Question 5

Imagine that you are working for a community organisation that supports people with intellectual disabilities. Your client, Bernard, is 19 years old and has to make the transition from his parent's home into an adult care centre. His family has requested your support in making this transition.

Discuss two (2) principles that you would need to uphold to ensure you are practicing a person-centred approach in your work with Bernard and his family.

(Approximate word count: 50 - 60 words)

Assessor instructions: The student's response must identify two principles of the person-centred approach to case management that they would use while working with Bernard and his family. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following examples.

- I would ensure that Bernard and his family members are seen as partners in the case planning process.
- I would make sure to consider both things that are important for Bernard and things that are important to Bernard when working with him to develop a case plan.
- I would take care to ensure that the case plan helps to build Bernard's sense of self-worth.

Question 6

Imagine that you are a case manager within an organisation that supports clients at risk of homelessness. Jamila, a 20-year-old woman, has just come to see you for an initial appointment. During your assessment, she disclosed that she has been sleeping rough for the last six months. She also discloses that she has been huffing gasoline, and despite wanting to quit, she says that huffing helps her forget about her pain. She tells you that she has been both physically and sexually assaulted while sleeping rough but that these incidents were never reported to the authorities.

Based on the information you obtained through the assessment, what are two (2) of Jamila's needs that would need to be addressed using the needs-based approach?

(Approximate word count: 100 - 110 words)

Assessor instructions: The student's response must identify two needs that they would address with Jacqueline using the needs-based approach to case management. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following examples.

- Jamila's priority need is housing. With Jamila's consent, I would engage with housing support services (such as shelters) in the community to make sure that Jamila's shelter needs are met.
- Jamila has identified that she is experiencing trauma resulting from multiple assaults. She has not indicated a desire for therapy but has suggested that she wants to stop huffing. Her need to get sober could be addressed through a referral to an addiction worker within the same service agency, so she does not need to worry about transport to multiple community support offices.

Question 7

Beth is a newly graduated case manager working for a busy community services organisation. Beth's organisation employs an intake officer who collects basic client information to pass on to the case manager before the initial appointment. The intake officer collected the following information about Beth's new client, Joy:

- Joy is a 32-year-old single mother with three sons aged 8, 6, and 4.
- Joy works part-time as a cashier in a supermarket, but her work hours were cut back six months ago, and she has been having significant financial problems since.
- Joy is behind in her rent and is growing concerned that she may soon get evicted.
- Joy contacted the organisation for assistance in finding an affordable rental home.
- Joy also reported that her eldest son has been behaving "badly" and that she needs some help to manage his behaviour. Joy mentioned that sometimes his behaviour gets so bad that she has to "thump him back into line".
- Joy said that she is originally from Papua New Guinea and, while she has lived in Australia for 10 years, she has no other family here and is struggling to manage her son's behaviour as he grows up. Particularly, her son's behaviours became worse after Joy came out as a lesbian.

After reviewing the intake information, Beth concludes that Joy simply needs a second job. Beth reasons that if Joy earns more money, she will be able to pay the rent. This would relieve the stress and tension in the household,

which should, in turn, also resolve the eldest child’s behavioural problems. As such, when Joy arrives for her appointment, Beth immediately tells Joy that she will refer her to her local employment support agency and that they will help her find a second job. Beth then advises that she will also make Joy an appointment with one of the financial counsellors employed with the organisation who will be able to help Joy “better manage her finances”.

- a) Briefly outline two (2) things that Beth did during this appointment that were inappropriate based on her role and responsibilities as a case manager.

(Approximate word count: 20 - 70 words)

Assessor instructions: The student’s response must identify two things that Beth did during the appointment that were inappropriate. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following examples.

- Beth made decisions based on an assumption regarding Joy’s needs. During the interview, Beth assumed that Joy wanted a second job when Joy had never indicated this. Case managers should not make assumptions.
- Beth made decisions regarding the case management plan without any collaboration with Joy (i.e., Beth advised Joy that she would arrange an appointment with a financial counsellor and a local employment support agency).
- Beth did not conduct any assessment of her own and instead relied solely on the information provided by the intake officer.
- Beth seemed to judge Joy and used judgemental language such as “better manage her finances”.
- Beth didn’t outline Joy’s rights.

- b) Imagine that, instead of Beth, you were assigned to work with Joy. Briefly outline what you would do during your initial appointment in order to effectively work with Joy and ensure her participation in the goal-setting and case-management process.

(Approximate word count: 125 - 130 words)

Assessor instructions: The student’s response must demonstrate the ability to facilitate client participation in the goal-setting and case-management process. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following examples.

Below are some suggestions for how I might work with Joy to facilitate her participation during all aspects of the case management process:

- I would spend some time gathering information from Joy herself rather than relying solely on the information provided by the intake worker. Doing this will not only give me a better understanding of her situation but will also engage her and keep her at the heart of the process.
- I would ask Joy to consider what she thinks will improve her situation and to set her own goals with this in mind. In doing so, Joy will feel ownership of her goals and is more likely to commit the effort required to achieve the goals set out within the case plan.
- I would provide Joy with information about her rights (e.g., the right to make a complaint and avenues of appeal, informed consent, etc.).

- c) List three (3) specific questions you might ask Joy during your initial interview to help better understand her situation and engage her in the process.

(Approximate word count: 80 - 90 words)

Assessor instructions: The student’s response must provide three specific questions that are likely to help better understand her situation and engage her in the process. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following examples.

- “The intake worker has told me a little bit about what has been happening for you, but I’m just wondering if you are able to tell me a bit about what’s been going on for you?”
- “Can you tell me a bit about your children and particularly what’s been happening with your eldest son?”
- “I’m aware that you don’t have any family in Australia, but do you have anyone else that provides support for you here?”

- d) Consider Joy’s statement that her son’s behaviour gets so bad that she has to “thump him back into line” sometimes.

- i) Identify a relevant statutory or legal requirement.
- ii) Explain how this is used to inform your work with Joy in relation to this statement.

Assessor instructions: The student’s response must demonstrate the ability to develop and utilise case management processes in accordance with statutory requirements. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following examples.

i) Relevant statutory/legal requirement	(Approximate word count: 5 words) Students are expected to refer to mandatory reporting legislation or child protection laws.
ii) How do you plan to work in accordance with such a requirement?	(Approximate word count: 50 - 60 words) <ul style="list-style-type: none"> • Conduct further assessment and clarify Joy’s statement to find out if there are any potential issues relating to child abuse. • If any, discuss limitations of confidentiality with Joy and report according to organisational and legal guidelines. • If not, continue to monitor and assess for any risk issues.

- e) Imagine that Joy’s case is now assigned to you. Discuss one (1) relevant diversity consideration and how you will incorporate such consideration into case management planning.

(Approximate word count: 20 - 30 words)

Assessor instructions: The student's response must demonstrate the ability to integrate appropriate cultural considerations into all aspects of case management planning. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following examples.

- Joy is originally from Papua New Guinea and has lived in Australia for 10 years.
- Joy identifies as a lesbian.
- Joy is a single mother facing financial disadvantages.

Responses must include appropriate strategies for ensuring the case management processes are culturally sensitive, respectful, and collaborative (for example, not making assumptions, considering the client's access to resources, reviewing the client's cultural needs, and ensuring referral services are appropriate).

Question 8

Imagine that you are working as a case manager in a local organisation that specialises in providing social support and activities for elderly clients. You are conducting an initial assessment interview with a 78-year-old client, Martha. Martha has been brought into your organisation by her daughter, Andrea. Martha currently lives alone, but Andrea visits her every other day, takes her shopping for food every week, and transports her to and from medical check-ups every few months. However, Andrea has recently taken a new job that requires her to relocate interstate, and she will no longer be available to assist her mother with her day-to-day needs.

Andrea would like Martha to move into a retirement community, but Martha is vehemently opposed to the idea. Martha states that she will not leave her home as she is proud of being capable of living independently and endeavours to do so for as long as she can. Martha is very upset by her daughter's decision to move. There is no other family in the local area, and Martha says that she feels abandoned.

Andrea reports that Martha seems to have become very withdrawn and depressed over the last few days. Andrea is concerned for her mother's welfare and wants your organisation to help arrange transport for shopping and medical check-ups and assist Martha in engaging in social activities and connections.

- a) Based on the information Martha and Andrea have provided, identify one (1) area of strength for Martha and explain how you intend to explore this with her in the assessment process.

(Approximate word count: 70 - 75 words)

Assessor instructions: The student's response must demonstrate the ability to collaborate with Martha to identify strengths (e.g., personal attributes, skills, talents, knowledge, experience, community connections, resources, and environmental assets). Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

I will acknowledge that Martha has been living all this while independently and endeavours to do so for as long as she can in her life. That shows that she has plenty of skills in managing her home and living needs. I will ask her about these skills and explore how she may continue to use them to support herself in the future.

- b) You also want to find out more about Martha's abilities and interests, which may be helpful for determining possible options for improving social activities and connections.

Write down two (2) things that you would ask Martha.

(Approximate word count: 25 - 30 words)

Assessor instructions: The student's response must provide two appropriate questions that they could use to collaborate with Martha to identify her abilities. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following examples.

Below are some suggestions for how I might work with Joy to facilitate her participation during all aspects of the case management process:

- "Martha, can you tell me about something that you do really well?"
- "Martha, I'm curious about what is something that your friends and family would say you're great at?"
- "Martha, is there anything that you really enjoy doing with others?"
- "Martha, how do you normally spend your time when Andrea is not around?"

- c) Based on the information retrieved during the assessment, identify Martha's immediate, short, and long-term needs.

Assessor instructions: The student's response must demonstrate the ability to work with Martha to identify the full range of immediate, short, and long-term needs of Martha. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following examples.

Martha's immediate needs	(Approximate word count: 15 words) <ul style="list-style-type: none">• Psychological assessment/counselling to address her withdrawn/depressed behaviour.• Social connection/links to appropriate services
Martha's short-term needs	(Approximate word count: 10 words) <ul style="list-style-type: none">• Transportation for shopping• Transportation for medical check
Martha's long-term needs	(Approximate word count: 25 words) <ul style="list-style-type: none">• Build social connections by engaging in social activities• Address any mental health concerns through counselling and psychological support• Long-term housing solution

- d) Consider Andrea's needs. What needs might Andrea have that should be integrated into the case management plan?

(Approximate word count: 30 - 35 words)

Assessor instructions: The student's response must demonstrate the ability to work to identify needs of Andrea. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

- Ensure that Andrea receives feedback regarding the case management plan and any actions taken.
- Advise Andrea if/when referrals are made to those services that she requested the involvement of.

e) Imagine that your organisation does not provide counselling or psychological services. You have identified the following service providers that your organisation often refers clients to:

- Relate Well is a 5-minute drive away from Martha's home. The next available appointment is next week, and it specialises in family relationships, couple counselling, and family mediation.
- Community Care is a 15-minute drive away from Martha's home; the next available appointment is in two weeks. They offer generalist counselling services to clients of various age groups.
- S. P. Counselling Centre is a 30-minute drive away from Martha's home. The next available appointment is in three days; it specialises in depression, anxiety, and eating disorder in children and young adults.
- Seniors' Mental Health Service is a 50-minute drive away from Martha's home. The next available appointment is in three weeks; it specialises in supporting senior citizens living with mental health illnesses.

Considering the experience, workload, and geographical location of these services, determine the most appropriate match for Martha and explain your reasoning.

(Approximate word count: 30 - 40 words)

Assessor instructions: The student's response must demonstrate the ability to match the requirements of the case plan to the experience, workload, and geographical location of the worker or service provider.

- Students are expected to select "Community Care" with reference to its close proximity and match for experience (i.e., they do provide generalist counselling to various age groups), with reasonable availability. However, other responses can be accepted if there is sufficient justification.

Question 9

Imagine that you are working as a case manager in a mental health support service. Many of the clients attending your service are experiencing complex mental health and associated issues. Imagine that you are working with Gene to develop a case management plan. During your conversation, Gene admits that he has been thinking about suicide lately and thinks he might hang himself that night.

Outline the steps you may take to respond to this situation.

(Approximate word count: 30 - 35 words)

Assessor instructions: The student's response must demonstrate the ability to identify strategies to deal with complex or high-risk situations. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

- Contact emergency or mental health crisis service or support Gene to do so.
- DO NOT leave Gene alone.
- It is also appropriate to seek support from others, e.g., colleagues, supervisors/managers.

Question 10

Imagine that you are working for the local community centre, providing case management support for disadvantaged people in the local community. You have just started working with Amir, a young single man originally from Iran. Amir came to Australia as a refugee approximately 3 years ago but has lived in an immigration detention centre for 2.5 years. Amir was released from detention six months ago when he was granted his permanent residency, meaning that he is free to live, work, and study in Australia.

- a) Consider what you have learned about diversity considerations in this module. Outline two (2) strategies that you can implement to integrate appropriate cultural considerations when working with Amir.

(Approximate word count: 25 - 30 words)

Assessor instructions: The student's response must demonstrate the ability to integrate appropriate cultural considerations into case management planning by suggesting relevant strategies. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

- Consider if Amir has specific language needs and whether interpreters are required.
- Make sure that any referral organisations can cater to these needs.
- Seek to understand Amir's value systems and how these may impact his perception of issues and interventions.

- b) During your first meeting with Amir, he provided the following information:

- Since his arrival in Australia, Amir has been trying to learn more advanced English skills but reports that he is struggling to do so without taking any classes. You provided Amir with information about the weekly English language class at a local neighbourhood centre, and he has agreed to contact them to enrol in the next class starting next week.
- Amir explained that he is currently unemployed and searching for work. Amir is currently on a Newstart allowance but is not aware of any job support providers. You agreed to contact the local job support provider to schedule a coordinated case meeting. In the meantime, Amir said that he would continue looking for work using job search websites.
- Amir reported that he feels isolated in Australia and has a very limited support network. Amir told you that he wanted to connect with the local Persian community but was unsure how to go about doing this. You provided Amir with the contact details for the local Persian society group. Amir explained that he would feel comfortable contacting them directly. Amir also expressed excitement about attending English classes as a way of meeting new friends.
- Amir reported that he is currently living with a friend but will not be able to stay there for much longer. When you explained the housing and homelessness services available to him, Amir requested support to visit his local department of housing office to attend a RentConnect appointment. In the meantime, Amir said that he would confirm how long he would be able to remain living with his friend.

Amir identified that he would like to begin working toward achieving the following goals:

- Improve his English skills by attending the weekly English language class at the local neighbourhood centre
- Access support from a local job support provider to help find employment.
- Make new friends and connect with the local Persian community.
- Find safe, affordable, and appropriate housing.

Your next scheduled appointment with Amir is in two weeks. Based on your current workload, you will be able to complete your allocated tasks within this time frame. Amir has agreed to complete his initial tasks within the same time frame.

Using the information provided, you must complete the following case management plan. **Note:** You are not required to use all rows – only use as many as you think are necessary to document the case management plan.

Assessor instructions: The student’s response must demonstrate the ability to develop a case management plan that reflects the following:

- Integration of expertise of relevant stakeholders and other service deliverers
- Negotiated and agreed on goals and operational processes
- Appropriate resource allocation
- Agreed responsibility for delivery
- Rights and responsibilities of the client.

Wording may differ, but appropriate answers must reflect the themes and characteristics of the following examples.

CASE MANAGEMENT PLAN: Amir		Date: XX.XX.XXXX	
Client needs/problem	Agreed goal	Actions/by whom/how	Target time frame
Amir is unemployed.	Find employment.	(Approximate word count: 25 - 30 words) The case manager will contact the job support provider to schedule a coordinated case meeting. Amir to continue looking for work on the internet.	2 weeks
Amir has limited English skills.	Improve English Skills.	(Approximate word count: 25 - 30 words) Amir to contact the local neighbourhood centre to enrol in the next English class. Amir is to attend the next class	Immediately One week (next English Class)

Amir feels isolated.	Increase social connections with the Persian community in the local area.	(Approximate word count: 30 - 35 words) Amir will contact the local Persian society group using details provided by the case manager. Amir will attend the next English language class as an opportunity to make new friends.	2 weeks
Amir is at risk of homelessness.	Find safe, affordable, and appropriate housing.	(Approximate word count: 35 - 40 words) The case manager will contact the Department of Housing to arrange a RentConnect appointment. Amir will talk to his friend and confirm how much longer he can stay living with him.	2 weeks

c) Outline one (1) strategy/process you would use to monitor Amir’s case plan.

(Approximate word count: 40 - 45 words)

Assessor instructions: The student’s response must identify one appropriate strategy to monitor and review the case management process. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following examples.

- At the next scheduled appointment with Amir, seek feedback about the process so far.
- Schedule a review appointment in consultation with Amir.
- As other services become involved, schedule a case management meeting to review progress.

d) If any changes or amendments need to be made to the plan, what steps would you take?

(Approximate word count: 80 - 85 words)

Assessor instructions: The student’s response must demonstrate an understanding of the processes required when a change is made to a case plan. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

- Discuss with Amir.
- Agree to changes that will be made.
- If required, negotiate required changes with any other stakeholders.

- Document changes. Documentation should note why the change has been made, the current state of goal attainment, what actions have been undertaken (e.g., referral to a different service provider), the new expected actions, details on how they will be achieved, the timeframes for these actions, and who is responsible for each action.
- Ensure that I follow organisational procedures.

e) Imagine that you contacted Amir two weeks later, and he reports no progress at all. He finds it really challenging to take the steps and is constantly worried about being looked down on for his lack of language skills and cultural background.

Describe how you might implement motivational interviewing techniques to continue supporting Amir and encourage him to take personal responsibility for his plan.

(Approximate word count: 115 - 120 words)

Assessor instructions: The student's response must demonstrate the ability to assist clients in taking personal responsibility using appropriate MI skills. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

- Resisting the righting reflex: instead of telling Amir what to do, ask Amir, "What do you think you should do?" or "How can I support you to change the situation?".
- Understanding Amir's motivation for change: e.g.,
 - Why do you want to make this change?
 - Who will benefit from the change?
 - How will these changes make your life different?
- Listen and respond with empathy.
- Motivate Amir: e.g.,
 - What is one thing you could do today to move closer to your goal?
 - If things were different, what would your life be like?
- Roll with resistance: demonstrate an understanding that resistance is normal and continue to assist Amir in moving forward.

Question 11

Case managers play an important role in facilitating client participation in case management meetings.

a) Imagine that you are still working with Martha from Question 8. You are about to set up a case management meeting for Martha, Andrea, a carer service, and a social worker who organises community activity for the elderly.

Outline what you would do to help Martha prepare for the meeting to encourage her to participate

meaningfully.

(Approximate word count: 50 - 55 words)

Assessor instructions: The student's response must demonstrate the ability to implement appropriate processes to enable the client to participate in case management processes. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

- Having a discussion with Martha about the agenda and purpose of the meeting, attending stakeholders and their roles, and what information will be discussed and shared.
- Suggest that Martha take time to consider what she wants and write down her opinions or questions to bring to the meeting.

b) Imagine that Martha informed you on the day that she could not attend the meeting in person due to a fall injury, and the meeting cannot be rescheduled until a month later.

Identify two (2) strategies that you could use to help facilitate Martha's participation in this meeting.

(Approximate word count: 25 - 30 words)

Assessor instructions: The student's response must provide two possible ways to facilitate Martha's participation. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following examples.

- Make sure there is a suitable representative attending on behalf of Martha (e.g., Andrea, her daughter).
- Have Martha write down her opinions/questions to read out and consider in the meeting.
- Have Martha engage via phone if she can.

Question 12

Imagine that one of your colleagues has recently resigned, and you have taken over their caseloads. You have just started working with this client, Helen, a 32-year-old mother with alcohol dependency and mental health issues (anxiety and depression). Helen's 8-year-old daughter, Bella, is currently in the care of the Department of Child Safety under a "Short-term Custody Order". This order means that while Helen's daughter is currently in need of protection and has been placed in the care of a foster carer, the goal of the case plan is for this family to be reunified. Child Safety has advised that reunification is not possible until such time that Helen proves that she is no longer drinking, finds some stability in her mental health, and has secured stable accommodation.

Helen has expressed a commitment to meeting the requirements put forward by the department to facilitate contact with her daughter. Her entire case management plan has been based on the requirements for reunification. Your old colleague referred Helen to a homelessness support program called Horizon Housing, and she has recently obtained long-term accommodation. She is also currently working with both a mental health support worker and an alcohol and other drugs counsellor. Helen has been engaging with both services; however, she is still drinking excessively.

During your first meeting with Helen, she expressed some confusion regarding the work she is required to complete with these services and the Department of Child Safety's requirements for reunification with her daughter. You know

from conversations that any delay in the unification process may lead to setbacks in Helen’s progress. Upon reviewing Helen’s file, you also noticed a lack of clarity regarding this outcome criterion, as well as a seeming lack of clarity among stakeholders regarding individual roles and responsibilities in working with Helen. Particularly, there is a double-up of counselling services, no communication between service providers, and each service has made decisions about Helen’s case without consulting the others. Additionally, Helen’s case has been recently assigned to a new Child Safety Officer, and this worker appears to have made some amendments to the reunification plan that have not been updated to Helen’s plan.

With Helen’s consent, you have decided to plan and facilitate a case management meeting to help clarify the boundaries and processes to be involved in supporting Helen. This meeting will include Helen, her mental health support worker, her alcohol and other drugs (AOD) counsellor, and her new Child Safety Officer (from the Department of Child Safety).

- a) Consider each of the stakeholders involved in Helen’s case management plan. (Note: Stakeholders include the client, her daughter, the service providers, and the wider community). How have the needs, value systems, rights, and responsibilities of these stakeholders shaped Helen’s case management plan?

(Approximate word count: 80 - 90 words)

Assessor instructions: The student’s response must demonstrate an understanding of how the needs, value systems, rights, and responsibilities of these stakeholders shaped Helen’s case management plan. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

- The reunification plan has shaped Helen’s case management plan because Helen wants to get her daughter back, and this is the requirement.
- The reunification plan is based on Helen’s daughter’s right to a safe environment and the community/Department of Child Safety’s responsibility to ensure this.
- The case manager has assisted Helen in developing a case management plan based on their responsibilities and Helen’s rights.
- Value systems of all service providers impact how they work with Helen.

- b) Consider the impact that the short-term custody order appears to have had on Helen’s goal-setting process and case management plan. Why is it important to keep this in mind when establishing the boundaries and procedures to be used as part of Helen’s plan?

(Approximate word count: 60 - 65 words)

Assessor instructions: The students must demonstrate an understanding of the impact that a short-term custody order has on Helen’s goal-setting process and case management plan. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

“Helen’s plan is based on meeting the requirements of reunification under the short-term custody order. Helen is motivated to regain custody and so wishes to work towards goals that will achieve this. Therefore, the Department of Child Safety has a significant amount of power, including the power to direct the goal-setting process and case management plan.”

- c) How do the considerations and requirements in Question 12 b) affect the approach you will take in working with Helen?

(Approximate word count: 60 - 70 words)

Assessor instructions: The student's response must demonstrate the ability to develop and utilise case management processes in accordance with statutory requirements. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

- Helen must be informed of the statutory requirements and relevant boundaries/decision-making authority.
- Case management focuses on the best interests of Helen's daughter.
- There may be reporting requirements attached to such requirements.
- On top of these, it is important to make sure Helen is consulted and collaborated with when setting goals and developing a plan within these boundaries.

- d) Relate what you would say at the beginning of the case management meeting to provide an introduction and establish the purpose and objectives of the meeting.

(Approximate word count: 60 - 65 words)

Assessor instructions: The student's response must demonstrate the ability to effectively establish and communicate the purpose and objectives of the meeting to relevant stakeholders. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

"Hi, everyone, and thank you for coming today. Helen and I chose to organise this meeting for a couple of reasons. First, to ensure that Helen is clear about the exact requirements necessary for reunification, and second, to clarify the roles and responsibilities each of them has in supporting Helen to reach her goal of reunification".

- e) One of the main agenda items discussed at the meeting is the double-up of counselling services for Helen. Helen has been attending counselling with both the mental health support worker and the AOD counsellor. From Helen's perspective, she didn't seem to understand why she needed to see two counsellors and felt like she was repeating herself a lot of times.

As the case manager, what steps would you take in the meeting to help relevant stakeholders identify and agree on their roles and boundaries of service delivery?

(Approximate word count: 105 - 115 words)

Assessor instructions: The student's response must demonstrate the ability to facilitate identification and agreement on worker roles, responsibilities, boundaries, and processes of service delivery. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

"I will gently bring up this agenda item and support Helen in sharing her query and confusion relating to this issue. I will then invite Helen's mental health support worker and AOD counsellor to take turns in clarifying what their

specific roles and processes are in relation to counselling provision for Helen. From there, we can all engage in a discussion about where the boundaries of each service are, whether there is any overlap, and how we can utilise the resources. In consultation with Helen, we can determine together whether she needs to see both workers, or attend as regularly as she is currently required to.”

- f) During the discussion, the AOD counsellor explained that their role is mainly to support Helen in going through a 12-week brief intervention program, in which counselling is offered as part of the intervention. However, it is common for clients to experience an exacerbation of mental health issues while going through the program, and this is where the mental health support worker comes in. A mental health support worker can also provide practical support, such as assisting Helen with attending these appointments, arranging for transportation, and further counselling support where necessary after the end of a brief intervention program.

Write down what you might say to Helen to help her understand the roles of and support provided by the AOD counsellor and her mental health support worker to resolve confusion about attending counselling with both.

(Approximate word count: 95 - 100 words)

Assessor instructions: The student’s response must demonstrate the ability to facilitate information sharing with clients. Responses must include clarification on the different roles/expertise of an AOD counsellor and a mental health support worker in a way that is likely for Helen to understand.

Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

“Helen, just to help clarify things for you – Michael here works specifically with your goal in relation to drinking. He is meant to work with you through a 12-week program. Part of the program involves some counselling. Michael’s involvement will normally end after you complete the program, though. Georgia here is a mental health support worker. She is involved in longer-term support as well as helping with practical issues such as attending appointments and transport. She can also continue to look after you when you have completed the program with Michael. Does that make sense?”

- g) Another agenda item for the meeting is related to the lack of communication between stakeholders and the lack of clarity on how changes to service provision are made by individual practitioners. What suggestions would you make regarding individual stakeholder accountabilities, information sharing, and decision-making processes to be utilised in Helen’s case to improve the plan’s effectiveness in helping Helen achieve her desired outcomes?

(Approximate word count: 100 - 110 words)

Assessor instructions: The student’s response must offer suggestions that demonstrate an understanding of case management processes that help improve case plan effectiveness with consideration of factors such as individual stakeholder accountabilities, information sharing, and decision-making processes.

Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

- Suggest that within the meeting, there is a discussion with the intention of drawing out and acknowledging each participant's experience, skills, and values in the case management meeting. This will allow for more informed decisions regarding interventions to be made.
- The rights, roles, responsibilities, accountabilities, and intended outcomes should be decided upon in this meeting and then reviewed on an ongoing basis.
- Case management meetings should be conducted before any significant changes are made to the plan.
- Any changes should be documented and distributed to all stakeholders.
- Regular contact between stakeholders.
- Ensuring that the focus stays on Helen's needs.

h) Establishing rapport is an important first step in facilitating an effective case management meeting. Explain how you might do this in the introductory phase of this meeting.

(Approximate word count: 75 - 85 words)

Assessor instructions: Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

I would begin the meeting by introducing myself and the role I will play in the meeting (as well as in the context of supporting the client), introducing the client, and then inviting other attendees to briefly introduce themselves. I would endeavour to establish a basic understanding of each participants' experience, skills, values and roles to assist with the subsequent discussion where decisions are made regarding how to best support the client.

Question 13

Imagine that you are still working with Amir from Question 10. Amir's case management plan has been implemented, and you contacted him to find out how things are going. Amir reports that he was preoccupied with getting a rental, and when he finally contacted the local neighbourhood centre to enrol in the English class, the worker there told Amir that he could not enrol. Amir says that he wasn't provided with a reason for why his enrolment was unsuccessful, though he strongly believes that it's because he is Iranian. Amir requests that you contact the centre to investigate the reason.

a) With Amir's consent, you decide to call the neighbourhood centre to investigate this matter. Relate what you would say to the worker.

(Approximate word count: 95 - 100 words)

Assessor instructions: The student's response must demonstrate the ability to negotiate any proposed changes arising from the case review with relevant parties. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

"I am aware that you spoke with Amir regarding the English classes that are conducted at your neighbourhood centre. I'm Amir's case manager, and he has asked me to call you on his behalf. Amir told me that he was unable to enroll in your English classes, but he was not sure of the reason for this. I think it's important that Amir

understands the reason why he is not able to attend. Can you explain this to me so I can pass this information on to him?"

- b) Imagine that the worker from the neighbourhood centre informs you that the upcoming English class is for the advanced level and that it is not likely to be suitable for Amir. The Beginner's English class, which is more suitable for Amir's level, has already commenced for two weeks, so it is currently closed for enrollment. The next class will commence in six weeks.

In response, relate how you would briefly explain Amir's situation and find out whether it is possible for Amir to participate in the Beginner's class that has recently started.

(Approximate word count: 65 - 70 words)

Assessor instructions: The students must demonstrate the ability to negotiate any proposed changes arising from the case review with relevant parties. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

"Thank you, I understand that the enrolment closed when Amir contacted. He is keen to improve his English, which will be very helpful for him in settling down here and getting a job. I'm wondering if there might be a way that he could still be accepted into this class. Would he be able to attend some extra sessions in the meantime?"

- c) The worker tells you that Amir can request to participate in the current class if he's happy to go in for additional tutoring sessions for the next couple of weeks to make sure he can catch up with the rest of the class.

Relate what you would say to Amir to explain what you have understood from the worker about the reason for unsuccessful enrolment. You also want to discuss with Amir his two options: (1) participate in the current class with additional support or (2) enrol in the class commencing six weeks later.

(Approximate word count: 105 - 1115 words)

Assessor instructions: The student's response must demonstrate the ability to negotiate any proposed changes arising from the case review with relevant parties. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

"Amir, I have spoken to the neighbourhood centre. This is what happens. When you contacted them, the class had already started so that's the only reason why they couldn't enrol you. There are two possible ways of moving forward here - first, we can try to get you into this class that has already started, but you will need to attend some additional tutoring sessions just to help you catch up with others. The second option is that they will have a new class starting in six weeks, and you can enrol into that one. What do you think about these two options?"

- d) Amir, thank you for helping him sort out the English class. He says he is going through RentConnect and will likely get a rental place organised in the next couple of weeks. As he'll be moving and trying to get settled down, he prefers to attend the next English class commencing in six weeks. You confirmed with Amir that he

would contact the centre again for enrolment in a month, which will be updated in his plan.

As per your organisational procedures, you must document a summary of actions and interventions you have undertaken in casework. Write a short summary about what you have done regarding supporting Amir in addressing issues with English class enrolment.

(Approximate word count: 80 - 85 words)

Assessor instructions: The student's response must demonstrate the ability to document all casework interventions. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

- Amir reported challenges relating to enrolment in the English class.
- The case manager (the student) contacted the neighbourhood centre to find out the reason for Amir's rejected enrolment and negotiate the possibility of enrolling into the current class.
- Information and two options were brought back to Amir.
- Amir decided to attend the next English class commencing in six weeks.
- Update to plan: Amir confirmed that he would contact the centre again for enrolment in a month's time.

Question 14

Imagine that you are working for an organisation that provides case management to disadvantaged young people in the community. A new client, Elena, was assigned to you six weeks ago. During your initial interview, you found out that Elena is an 18-year-old mother with a three-month-old daughter. She had been living with her parents, but when they found out about her pregnancy, she was kicked out of their home. Since that time, Elena has been living with a couple of friends, but Elena reported that her relationship with these friends had deteriorated since the birth of her daughter. Elena stated that her friends were "not happy with a baby in the house".

Elena reported that she has applied for numerous rental units but has not been successful, explaining that she doesn't have any rental history, no rental references, has a low income (on Centrelink benefits), and feels like she is disadvantaged because she is a young single mother.

During this initial meeting, Elena tells you that her primary goal is to "no longer have to move around, live with nasty housemates, and actually have somewhere nice to live with my daughter". Her secondary goals included seeking out the support of a mother's group in her local area and finishing her high school studies via a flexible TAFE program.

- a) Consider Elena's primary goal: "No longer have to move around, live with nasty housemates, and actually have somewhere nice to live with my daughter". How would you go about helping Elena transform this into a goal statement that is realistic and positive (for example, instead of what Elena will not do, the goal is stated as what she will do)?

(Approximate word count: 50 - 55 words)

Assessor instructions: The student's response must demonstrate the ability to assist clients in setting and achieving realistic targets for change or action. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

“I will explore this statement and encourage Elena to identify what she wants to achieve instead of what she does not want to. From what she has said, she wants stable accommodation with her daughter, so I would suggest that we phrase her goal as attaining stable and safe accommodation.”

- b) With Elena’s permission, you referred her to RentConnect to help her with her goal to obtain a rental. You also provided her with information on a local mothers' group and gave her contact details for the TAFE enrolment office.

As part of your organisational procedures, write a short summary of Elena’s circumstances and goals to be included in her referral to Rent Connect. **Note:** You must make sure that you use appropriate, respectful language and comply with any relevant privacy and confidentiality requirements (for example, only including relevant details).

(Approximate word count: 45 - 50 words)

Assessor instructions: The student’s response must demonstrate the ability to document the case management process using appropriate protocols. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

“Elena (18 years old) is a single mother caring for a 6-month-old daughter. She reported strained relationships with friends with whom she is currently living. Elena’s primary goal is obtaining stable and safe housing for her and her daughter to live independently.”

- c) Describe how you will go about monitoring the effectiveness of case management processes against Elena’s agreed goals.

(Approximate word count: 25 - 30 words)

Assessor instructions: The student’s response must demonstrate the ability to implement a strategy to monitor the effectiveness of case management processes against agreed goals. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

“I will maintain weekly contact with Elena to find out how she’s proceeding with the plan and whether there are any barriers she met in implementation.”

- d) As Elena’s case manager, you will also need to make sure the planned service provision (for example, RentConnect) is implemented and effective for Elena. What steps or processes will you take to monitor this?

(Approximate word count: 35 – 40 words)

Assessor instructions: The student’s response must demonstrate the ability to implement a strategy to monitor the effectiveness of case management processes against service provision. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

“I will maintain regular contact with the service providers to find out how the processes have gone for Elena and make sure that they are provided with what they need to proceed.”

- e) Imagine that it has been six weeks since your initial appointment with Elena. At your follow-up meeting, Elena reported that she has been engaged with the mother’s support group you told her about, but due to her child being sick, she has made no contact with TAFE and has not yet sourced stable accommodation.

Consider the progress that has been made so far. What changes would you suggest making to Elena’s case plan?

(Approximate word count: 35 - 40 words)

Assessor instructions: The student’s response must provide appropriate and reasonable suggestions regarding possible changes to Elena’s case plan. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

- Possible referral to another housing organisation to provide more intensive housing support.
- Case manager to provide support to contact TAFE (for example, sit with a client when she contacts TAFE by phone)

- f) Imagine that three weeks have passed, and Elena has just successfully obtained a rental. She is now connected with a local playgroup and an education officer at TAFE who is working out possible studying options with Elena.

Outline what you would do to monitor Elena’s and other stakeholders' satisfaction with the case management processes.

(Approximate word count: 25 - 30 words)

Assessor instructions: The student’s response must demonstrate the ability to implement a strategy to monitor the effectiveness of case management processes and client and stakeholder satisfaction. Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

- Contact Elena regarding progress and obtain her feedback.
- Arrange a meeting with the stakeholders to find out any challenges and their satisfaction.

- g) It has now been four months since your initial case management meeting with Elena. You have not seen her for two months – she has cancelled every appointment since. As far as you know, she has made no progress towards enrolling in TAFE. You have attempted to contact Elena via phone and mail but have had no success. You have spoken with your supervisor, and they have agreed to close her case effective immediately. As per your organisation’s policies, you have posted Elena an evaluation form, and she is required to complete a case closure form to close her file.

Using the information provided, complete the following case closure form.

(Approximate word count: 80 - 100 words)

Assessor instructions: The student's response must demonstrate an ability to accurately complete the case closure form according to their organisational requirements (outlined in the scenario). Wording may differ, but appropriate answers must reflect the themes and characteristics of the following example.

Case Closure Form

Client name: **Elena**

Age: **18**

The case opened: **XX/XX/XXXX.**

Case closed: **Today's date.**

Goals identified at the beginning of the case management process:

- **Access stable accommodation.**
- **Seek support from a mother's group in her local area.**
- **Finish her high school studies via a flexible TAFE program.**

Goals achieved:

- **Accessed the support of a mother's group in her local area.**
- **Accessed stable accommodation.**

Goals not achieved:

- **Finish high school studies via a flexible TAFE program.**

Reason for case closure:

Lost contact with the client

Evaluation form provided?

Yes **No**

Assessment checklist:

Students must have completed all questions/activities within this assessment before submitting. This includes:

1	14 questions to be completed in the format requested	<input type="checkbox"/>
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Congratulations, you have reached the end of Assessment 2!

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