



CHCCCS004

Assess co-existing needs

Assessment 3 of 3

Case Study

Assessor Guide



Assessment Instructions

Task overview

This assessment task is divided into 2 parts.

- Part A: Assess client needs
- Part B: Evaluate assessment and referral processes

Read each task carefully before capturing your response in the format indicated.

Additional resources and supporting documents

To complete this assessment, you will need to access the following:

- DZB Services – Company Profile
- DZB Services – Service Delivery Policy and Procedure
- DZB Services – Assessment Process – Client Information Sheet
- Client profiles – Darcy and Amber Freeman
- Client Intake Form – Darcy Freeman
- Informed Consent Form – Darcy Freeman
- Homelessness Index – Darcy and Amber Freeman
- Parenting Stress Index – Darcy Freeman
- Client Intake Form – Amber Freeman
- Informed Consent Form – Amber Freeman
- Student Assessment – Amber Freeman
- Achenback Child Behaviour Checklist – Amber Freeman
- Additional information provided from additional sources

These resources are located in the *Assessment 3* page on the LMS.

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.

IMPORTANT NOTE:

Review the following DZB Services collateral for this assessment:

- DZB Services – Company Profile
- DZB Services - Service Delivery Policy and Procedure
- DZB Services - Assessment Process – Client Information Sheet

All **DZB Services** documents references in this assessment are available on the *Assessment 3* page of the *LMS*.

Part A: Assess client needs

CASE STUDY:

You are a Case Worker at DZB Services, an organisation dedicated to bridging the gap between clients in need and community and mental health support services.

DZB Services aims to facilitate seamless connections between clients requiring assistance and a network of community services and mental health support providers. By acting as a bridge, we streamline the process, ensuring timely access to appropriate services.

A new family has been referred to you for wholistic community services and mental health support. You have been asked to complete client assessments, determine appropriate support services and create a plan for them to engage these services as appropriate.

Review the following client information pack for Darcy and Amber Freeman for Part A:

- Client profiles – Darcy and Amber Freeman
- Client Intake Form – Darcy Freeman
- Informed Consent Form – Darcy Freeman
- Homelessness Index – Darcy and Amber Freeman
- Parenting Stress Index – Darcy Freeman
- Client Intake Form – Amber Freeman
- Informed Consent Form – Amber Freeman
- Achenback Child Behaviour Checklist – Amber Freeman
- Student Assessment – Amber Freeman
- Additional information provided from additional sources

Task 1: Client assessment meeting

Conduct a client assessment meeting with Darcy and Amber Freeman in order to assess and support their needs.

Task: During the assessment session you must:

1. Introduce yourself, your role as Case Worker at DZB Services and the assessment process.
2. Confirm you will be recording the session through note taking and ask for Darcy's approval to do so.
3. Confirm they may ask questions at any stage during the meeting.

4. Confirm receipt of the resources within the client information pack, and clarify any information needed to support assessment.
5. Apply a strengths-based approach to assessment incorporating skill, strength and success identification.
6. Empower the clients to identify and prioritise their most urgent or worrying needs.
7. Capture clients' needs in relation to the location and accessibility of service delivery options.
8. Confirm your understanding of their needs based on what was included in the client information received as well as their thoughts and priorities raised in the session.
9. Confirm next step.

Observable skills: You must demonstrate the following skills during the course of the meeting:

- Conduct a professional meeting with the clients so as to conduct a client assessment for support services for each with a focus on your presentation, language and tone.
- Guide and support the clients through the process, allowing for client encouragement and empowerment.

Parameters: This meeting must not exceed 15 minutes and must involve 2 additional participants. This recording may be captured in 2 parts:

- Part 1: Start with Darcy for 10 minutes to complete a full assessment session with all the points covered including their own concerns and priorities, and an overview of Amber's key challenges from their perspective as parent at the end.
- Part 2: Bring Amber in with Darcy for 5 minutes to complete an abridged assessment session to discuss her concerns and priorities, as appropriate.

In total, the 2 parts must not exceed 15 minutes. Details on who to engage and the recording requirements are captured in the Role-Play Instructions.

KEY OBSERVATION CRITERIA
<p>Students are required to engage in a short assessment session with 2 clients. They are to apply a strengths-based approach to assessment, empower the clients to identify and prioritise their issues and collect information needed to make recommendations to support them.</p> <p>Participants must address specific requirements as identified in the task, observable skills and Role-Play Instructions below.</p>

ROLE-PLAY INSTRUCTIONS
<p>In this task, you will participate in and record a role-play meeting with 2 other participants.</p> <p>The role-play must not exceed 15 minutes in total and must address all elements of the Task, Observable skills and Key Observation Criteria set out above.</p> <p><u>Resourcing requirements:</u></p> <p>In this task you will participate in a role-play meeting with another person. This may be resourced using one of the following options:</p>

1. A peer who you are already working with, within your qualifications industry.

Peer participants will need to state their name and job title at the start of the recording to demonstrate their industry relevance as a participant and inform their consent.

2. A fellow student. Please contact your fellow students via the Discussion Forum and coordinate your role play with them directly.

Student participants will need to state their name and that they are a student (as their job title) at the start of the recording to inform consent.

If you are unable to find a participant to play the role of the other participant, contact your assessor via the Discussion Forum who will discuss options for pairing up with another student to complete this task.

Participant briefing:

You must fully brief all participants prior to the recording, providing them with the context to the role play/meeting, a role outline to play, a copy of the *Task* (including all relevant case study material), *Observable skills* and *Key Observation Criteria* above so that they can prepare for the recording.

Total number of participants: 2

Role 1 Outline

- **Role:** Client Darcy Freeman in line with the client information pack referred to in Part A.
- **Gender:** The client Darcy Freeman may be performed by a male or female participant for role play purposes.
- **Contribution:** They must contribute as follows:
 - Attend the session as a client and the parent of a second client, Amber Freeman.
 - Review and understand the client persona as reflected in the following documents:
 - Client profiles – Darcy and Amber Freeman
 - Client Intake Form – Darcy Freeman
 - Informed Consent Form – Darcy Freeman
 - Homelessness Index – Darcy and Amber Freeman
 - Parenting Stress Index – Darcy Freeman
 - Client Intake Form – Amber Freeman
 - Informed Consent Form – Amber Freeman
 - Student Assessment – Amber Freeman
 - Achenback Child Behaviour Checklist – Amber Freeman
 - Additional information provided from additional sources
 - Identify and present a prioritised version of their needs for support for themselves and their daughter, eg. Darcey has a history marked by depression and anxiety with specific pressing struggles with homelessness (current living arrangements expire soon with nowhere to go) and her parenting responsibilities. Her daughter Amber, has behavioural issues at school despite being bright and well behaved until about a year ago.
 - Indicate Darcy is her priority.
 - Indicate she is willing to work hard in both a paid (a job to contribute financially) and unpaid (perform services such as cleaning and gardening) capacity to help secure housing.

- Identify a preferred location for support services and employment solutions to be based in line with local area and accessibility.

Role 2 Outline

- **Role:** Client Amber Freeman in line with the client information pack referred to in Part A.
- **Gender:** The client Amber Freeman may be performed by a male or female participant and must be played by someone over the age of 18 for role play purposes.
- **Contribution:** They must contribute as follows:
 - Attend the session as an underage client, Amber Freeman.
 - Review and understand Amber's persona as reflected in the Client Profile.
 - Indicate she is tired of moving and being scared all the time and she wants somewhere safe for them both.
 - Indicate she is not sure why she is the way she is but she isn't having fun either.
 - Show a disregard for Darcy through disruptive behaviour or by ignoring her.
 - Demonstrate a lack of interest in the process or people concerned.

Recording instructions

Your role play must be recorded with all participants voices recorded on the one screen.

Once you have logged into your course assessment page, there is the option to record directly into the online platform. Alternatively you may use a system such as Zoom, Skype or Teams to record the session and then load the file on completion.

Consent to participate in the recording must be captured for all participants at the start of the meeting. This is achieved by the student reading the following statement at the start of the recording, with all participants replying their name and job title to inform consent.

"This session/presentation is being recorded for assessment purposes for my course with Swinburne Open Education. This session will be recorded and submitted through my course online learning platform to my Assessor for grading. All participants in this session indicate their consent to be included in this recording by stating their name and job title."

The time taken to capture consent at the start of the recording does not count towards the recording time limit.

Include this recording as part of your assessment submission.

Assessor instructions: Students must conduct a client assessment session with 2 participants playing the roles of Darcy and Amber Freeman. This meeting may be captured in two parts but must not exceed 15 minutes in total [excluding the participant consent].

Students must complete all elements of the Task, Observable skills and Key Observations Criteria identified above.

Assessors are to indicate result as Satisfactory [S] or Not Yet Satisfactory [NYS] in the Assessor Observation Checklist below.

ASSESSOR OBSERVATION CHECKLIST: Part A, Task 1

Students must demonstrate each of the performance criteria outlined in the observation checklist below.

ACTIVITY	SATISFACTORY	NOT YET SATISFACTORY	ASSESSOR COMMENTS Add comments as appropriate
Delivery checklist			
Recording completed with 2 participants in the roles identified.	<input type="checkbox"/>	<input type="checkbox"/>	The student completed the session with 2 other participants, playing the role of clients (mother and daughter) per the case study.
Capture consent of all participants.	<input type="checkbox"/>	<input type="checkbox"/>	The student captured consent of all parties to the role play recording.
Recording completed within the timeframe allocated.	<input type="checkbox"/>	<input type="checkbox"/>	The student recorded the session within the timeframe allocated (excluding participant consent time). This may be captured in 2 parts to allow for a full assessment session with Darcy (10 minutes) and then an abridged assessment session with Amber (10 minutes).
Task checklist			
1. Introduce themselves, their role as Case Worker at DZB Services and the assessment process.	<input type="checkbox"/>	<input type="checkbox"/>	The student must: <ul style="list-style-type: none"> • Introduce themselves, • outline their role as Case Worker at DZB Services • outline the assessment process.
2. Confirm you will be recording the session through note taking and ask for the clients approval to do so.	<input type="checkbox"/>	<input type="checkbox"/>	The student must confirm they will be taking notes and gain clients verbal consent to do so.
3. Confirm the client may ask questions at any stage during the meeting.	<input type="checkbox"/>	<input type="checkbox"/>	The student must confirm that the client is encouraged to ask questions throughout the assessment as needed.
4. Confirm receipt of the resources within the client information pack, and clarify any information needed to support assessment.	<input type="checkbox"/>	<input type="checkbox"/>	The student must confirm the resources they have received ahead of the session including: <ul style="list-style-type: none"> • Client profiles • Client Intake Forms • Client Consent Forms • Homelessness Index – Darcy and Amber Freeman • Parenting Stress Index – Darcy Freeman • Student Assessment – Amber Freeman • Achenback Child Behaviour Checklist – Amber Freeman • Information provided from additional sources identified by the client in their intake forms.
5. Apply a strengths-based approach to assessment incorporating skill, strength and success identification.	<input type="checkbox"/>	<input type="checkbox"/>	The student participated in a strengths-based assessment process incorporating the following: <ul style="list-style-type: none"> • Collaboratively engaging the client • Identifying client skills, talents and resources

			<ul style="list-style-type: none"> • Highlighting positive behaviours such as initiative, resilience and problem-solving. • Use of positive language. • Reference to assessment tool outcomes in line with priorities identified. <p>The student may reference the clients skills, strengths and successes.</p> <p>For Darcy this could be her love for her daughter and desire to find ways to support her and improve their situation for her.</p> <p>For Amber this could be her previous academic and behavioural record indicating a bright mind in a sweet girl, or more recently her interest in reaching out to the school counsellor.</p>
6. Empower the client to identify and prioritise their most urgent or worrying needs.	<input type="checkbox"/>	<input type="checkbox"/>	<p>The student must encourage the client to identify their top needs and most urgent concerns.</p> <p>The top 2 priorities could be:</p> <ul style="list-style-type: none"> • Homelessness for both Darcy and Amber – with current arrangements expiring soon. • Developing Darcy’s parenting skills to support Amber • Employment for Darcy • Counselling or other support for Amber
7. Capture client needs in relation to the location and accessibility of service delivery options.	<input type="checkbox"/>	<input type="checkbox"/>	The student must confirm any location and accessibility restrictions the client would like considered in their plan.
8. Confirm your understanding of their needs based on what was included in the client information received as well as their thoughts and priorities raised in the session.	<input type="checkbox"/>	<input type="checkbox"/>	The student must confirm what they believe the client has identified as their top needs and most urgent concerns and relate this back to the information provided in the pack.
9. Confirm next step.	<input type="checkbox"/>	<input type="checkbox"/>	The student must outline the next steps in the process, for them to take this away, analyse the options and develop a plan for the clients which they will present back shortly.
Skills checklist			
Conduct a professional meeting with clients so as to conduct client assessments for support services with a focus on presentation, language and tone.	<input type="checkbox"/>	<input type="checkbox"/>	<p>Students must be well presented and use appropriate language and tone in their interaction with the clients.</p> <p>This should look different for the session with Darcy versus the session with Amber.</p>
Guide and support the clients through the process, allowing for client encouragement and empowerment.	<input type="checkbox"/>	<input type="checkbox"/>	The student guided their clients through the process, encouraging them to participate in identifying and prioritising their concerns.

Task 2: Seek colleague input

In addition to the assessment and referral services offered in the DZB Services – Company Profile, you have recently received a company communication advising the company now offer the following courses to clients:

- **Wellness and Self-Care Workshops:** This course focuses on promoting overall well-being and self-care practices. It covers topics such as stress management, healthy lifestyle choices, and techniques for maintaining mental and emotional balance.
- **Mindfulness and Relaxation Training:** Designed to teach mindfulness techniques and relaxation exercises, this course helps clients develop skills for managing stress, anxiety, and improving their mental focus.
- **Life Skills and Goal Setting Workshops:** This course focuses on practical life skills such as budgeting, time management, and goal setting. It empowers clients to develop and achieve personal and professional goals, contributing to their overall life satisfaction.

In addition, they expect to have the following courses available for release within the next month:

- **Social Skills and Communication Training:** Addressing the importance of effective communication and interpersonal skills, this course helps clients build positive relationships with others. It covers active listening, conflict resolution, and assertiveness techniques.
- **Parenting Skills and Positive Discipline Program:** This program aims to equip parents with the knowledge and skills needed to create a nurturing and structured environment for their children. It emphasises positive discipline techniques, communication strategies, and stress management to enhance the overall well-being of both parents and children.

Create an email to a colleague, Mia Ayam [MiaAyam@dzbservices.org.au], asking for their advice on the application of 2 or more of these courses in the care of your current client.

Provide them with a short outline of the client's history and needs in line with the *De-identification process [section 4.4]* of the DZB Services – Service Delivery Policy and Procedure.

Capture this email in the email template below.


Ensure your communication is professional and includes the following:

- A brief client history and needs overview for context based on the clients priorities as identified in their assessments and the assessment session in Part A Task 1, de-identified for client privacy and confidentiality.
- Identification of 2 or more courses that may support your clients needs.
- Identification of at least 1 alternative course for consideration.
- Potential benefits and risks for recommending each course option.
- A recommendation and request for advice on the options presented.

[Approximate word count: 500 words in the body of the email]

Capture this communication in the email template below.

Email Template	
To:	<<Add name(s) and position title of main email recipients here>>
From:	<<Name>>@dzbservices.org.au
CC:	<<Add names and position title of carbon copy email recipients here (leave blank if none)>>

Date/time:	<<Add the time and date of the email here>>
Subject:	<<Add the subject of the email here>>
Attachments:	<<Add the name of any attachments here (leave blank if none)>>
To <<Add email recipient(s) name here>>, <<Add message here. Add as much space as necessary.>> Kind regards,	
 <<Student name>> Case Worker 1 Woodstream Pl, Brookvale NSW 2100 Phone: 02 9988 7766 http://www.dzbservices.org.au	

Assessor instructions: Students must create an email to a colleague, Mia Ayam, to discuss the suitability of a new internal service versus an external offering, seeking their advice.

Student communication must be professional and include the following:

- A brief client history and needs overview for context, de-identified per the [DZB Services - Service Delivery Policy and Procedure](#) for client privacy and confidentiality.
- Identification of 2 or more courses that may support your clients needs.
- Identification of at least 1 alternative course for consideration.
- Potential benefits and risks for recommending each course option.
- A recommendation and request for advice on the options presented.

De-identification must involve sharing only overview level information that does not provide specific information relating to the clients name, age, address or any other factors that may enable the recipient to determine the clients identity. An alias or describing factors may be used to share the pertinent information.

A sample answer is provided below. Students answers will vary based on the issues identified and client prioritised in Part A Task 1 however they must incorporate 2 or more of the internal course options and 1 external course option for comparison, the risks and benefits and a request for peer assistance.

Email Template	
To:	<i>miaayam@dzbservices.org.au</i>
From:	<i><<StudentName>>@dzbservices.org.au</i>
CC:	
Date/time:	<i>11:00am xx/xx/xx</i>
Subject:	<i>Advice on client support</i>

Attachments:

To *Mia*,

I am reaching out to seek your advice on courses that could potentially benefit my current clients. As you know, DZB Services has recently introduced several new courses for client support, and I believe some of them could be instrumental in addressing the specific needs of our client, although I have my concerns.

Client Overview:

Our client is a single mother with a 10 year old daughter. She has a history marked by depression, anxiety, homelessness and struggles with her parenting responsibilities. Her daughter has behavioural issues at school and home that her mother describes as completely out of control and impossible to manage, and she is also homeless at the moment. Through our assessments and discussions, it has become evident that their current priorities include parenting skills and general self-care.

Course options for consideration:

DZB Services - Wellness and Self-Care Workshops:

Potential Benefits:

- Addressing overall well-being, stress management, and healthy lifestyle choices, aligning with the client's needs.*
- Offered inhouse this course allows us to maintain contact with the client in order to determine the success of the course and additional needs on completion in a more timely fashion.*
- This course is release ready and as it is new it can be offered free of charge.*

Risks:

- It is a relatively new and untested resource so the value of the course is unknown.*

DZB Services - Parenting Skills and Positive Discipline Program:

Potential Benefits:

- Providing parents with the knowledge and skills needed to create a nurturing and structured environment for their children helping both of my clients (mother and through support of the mother, the daughter).*
- Offered inhouse this course allows us to maintain contact with the client in order to determine the success of the course and additional needs on completion in a more timely fashion.*
- This course is new and up to date and can be offered free of charge.*

Risks:

- This course is not yet developed or released so the client would have a 1 month time gap.*
- It is an untested resource so the value of the course is unknown.*

Bluebird Psychology - Positive Parenting:

Potential Benefits:

- It claims to offer the same benefits and outcomes as our internal course.*

- *It is already developed and ready for immediate placement.*
- *It has been running for over 12 months with positive reviews.*

Risks:

- *External so 1 step removed from post-course care.*
- *It incurs a fee of \$950 to attend.*

Recommendation:

I feel that the internal Wellness and Self-Care Workshop could be a good starting point for this client and if the course is well received I could then book her into the internal Parenting Skills and Positive Discipline Program, although if she does not feel the initial course was of value I can immediately book her into the external Positive Parenting course.

That said, I would greatly appreciate your insights on which of these courses you feel might be most appropriate. Additionally, if you have any alternative suggestions or considerations, please let me know.

Thank you in advance for your help.

Kind regards,



<<Student name>>

Case Worker
1 Woodstream Pl, Brookvale NSW 2100
Phone: 02 9988 7766
<http://www.dzbservices.org.au>

Task 3: Client Service Plan recommendations

CASE STUDY:

You recently contacted a colleague for advice on your plan of action around courses to support Darcy and Amber Freeman. Mia has come back to you and confirmed that they feel your recommendation offers the best opportunity for your clients and that you should proceed with this.

Mia has asked that you let her know how this works out for your client so she can consider a similar approach in the future if needed.

Based on the information provided and the discussions during the client assessment sessions conducted in Part A Task 1, identify and analyse the clients complex co-existing needs.

Capture this assessment process in the Assessment Outcomes – Service Plan templates found at Appendix A for Darcy and Appendix B for Amber below.

Focus on the top 2 priorities overall as identified by the clients in the assessment sessions to determine immediate actions to engage support. Also consider your colleagues advice regarding your recommendation in Part A Task 2.

NOTE: The clients are to be presented this plan in Part A Task 4. As such, ensure you use appropriate language and tone for this audience in this form.

Assessor instructions: Students must complete the [Assessment Outcomes – Service Plan](#) templates provided in Appendix A [Darcy] and Appendix B [Amber]. Students must include the following in their answers:

1. Personal Information – directly copied from the Client Intake Forms
2. Emergency Contact Information - directly copied from the Client Intake Forms
3. Assessment Session Details - reflecting the initial assessment date as conducted.
4. Assessment Summary – A brief summary of the clients history based on the information provided in the profile, intake forms and assessment tools, as well as the Assessment sessions conducted in Part A Task 1.
5. Strengths Description – An overview of 2 strengths/ positive elements to align the assessment to a strengths-based approach.
6. Co-existing Needs: A short introduction to the top 2 co-existing needs identified by the clients in the Assessment session.
7. Symptoms, Diagnosis and Plan: A review of the first need identified capturing an analysis of the complex and interrelated nature of the issue, referencing the urgency of the problem and risks and suitability to potential solutions. Researching potential support service providers in line with client needs for recommendation and applying the advice received from a peer (per Part A Task 2) above.
8. Symptoms, Diagnosis and Plan: A review of the first need identified capturing an analysis of the complex and interrelated nature of the issue, referencing the urgency of the problem and risks and suitability to potential solutions. Researching potential support service providers in line with client needs for recommendation and applying the advice received from a peer (per Part A Task 2) above.
9. Goals - Reflect 2 short term and 2 long term goals in line with the clients identified priorities and the client information pack received.
10. Client Agreement and Signatures – This is blank for this Task as it is completed during the Assessment Outcome session recorded as Part A Task 4.

Students must capture their answer in the templates found at Appendix A for Darcy and Appendix B for Amber, however a sample is provided below with key points to be considered and reflected for each client side by side. Students answers may vary however they must reflect the clients profiles, needs and priorities identified in the recorded assessment sessions captured in Part A Task 1 above.



DZB SERVICES

Coordinating support across the community services and mental health industry

ASSESSMENT OUTCOMES

Service Plan

DZB Services representatives complete the following template in order to capture and report on client Assessment Outcomes and the Service Plan as agreed with the client.

NOTE: All information provided in this form and subsequently discussed will remain confidential.

1. PERSONAL INFORMATION	DARCY FREEMAN
Client's Full Name:	<i>Darcy Freeman</i>

Preferred Name:	<i>Darcy</i>
Date of Birth:	<i>9/8/1998</i>
Gender:	<i>Female</i>
Address:	<i>Women's Shelter, Toowoomba Queensland [temporary]</i>
Contact Number:	<i>0412 122 998</i>
Email Address:	<i>DarcyF98@gmail.com.au</i>

2. EMERGENCY CONTACT INFORMATION	DARCY FREEMAN
Name:	<i>Not applicable</i>
Relationship:	
Phone Number:	

1. CHILD'S PERSONAL INFORMATION	AMBER FREEMAN
Full Name:	<i>Amber Freeman</i>
Preferred Name:	<i>Amber</i>
Date of Birth:	<i>12/12/2012</i>
Gender:	<i>Female</i>
Address:	<i>Women's Shelter, Toowoomba Queensland [temporary]</i>

2. PARENT/ GUARDIAN INFORMATION	AMBER FREEMAN
Name:	<i>Darcy Freeman</i>
Relationship:	<i>Mother</i>
Date of Birth:	<i>9/8/1998</i>
Gender:	<i>Female</i>

Address:	<i>Women's Shelter, Toowoomba Queensland (temporary)</i>
Contact Number:	<i>0412 122 998</i>
Email Address:	<i>DarcyF98@gmail.com.au</i>

3. ASSESSMENT SESSION DETAILS

[Sample reflects answer that is the same for both clients.]

Initial assessment date:	<i><<Date of assessment session recording>></i>
Last assessment date:	<i><<Blank or the same date as above.>></i>

4. ASSESSMENT SUMMARY

Provide a concise summary of the client's current situation, highlighting key strengths, challenges, and co-existing needs identified during the assessment process.

[Approximately 120 words]

DARCY FREEMAN	AMBER FREEMAN
<p><i>Darcy and Amber are living in a Women's Refuge in Queensland. Her homelessness is making it hard for Darcy to secure work as she is never sure where she will be living.</i></p> <p><i>Darcy struggles with Amber who is aggressive, disruptive and unhappy.</i></p> <p><i>Amber's behaviour also impacts Darcy's ability to work as she is often called away to help her daughter.</i></p> <p><i>Darcy is underweight and undernourished due to her and is binge drinking to cope.</i></p> <p><i>Darcy suffers depression and anxiety and takes anti-depressants regularly.</i></p> <p><i>Darcy is strong and has persevered through ongoing hardships. She has a fierce passion for her daughter.</i></p> <p><i>Darcy needs help to secure housing and support her daughter physically and emotionally.</i></p>	<p><i>Darcy and Amber are living in a Women's Refuge in Queensland. Her homelessness is exacerbating Amber's behavioural issues as she feels scared and without any control or security.</i></p> <p><i>Amber is socially withdrawn, aggressive and oppositional, and suffers persistent insomnia, stomach aches and headaches. This is also impacting her results and behaviour at school.</i></p> <p><i>Amber feels scared and lost and is not sure what to do to feel better. She has started to resent her Mum for not protecting her.</i></p> <p><i>Amber has spoken with the school counsellor who is available to offer support as needed. She seems keen to pursue this, but unsure how to.</i></p> <p><i>Until recently Amber and Darcy had a great relationship. Amber was a well behaved, high achiever so is capable and bright.</i></p>

5. STRENGTHS

Identify the client's strengths, skills, and positive attributes observed during the assessment.

STRENGTH TYPE & STRENGTH DESCRIPTION

[Up to 40 words each]

DARCY FREEMAN	AMBER FREEMAN
<ol style="list-style-type: none"> <i>Love for her daughter: Darcy adores Amber and wants nothing but the best for her, which is why she is seeking support to find them a home and build the skills needed to better support her daughter.</i> <i>Motivated to find a job and work: Amber is very motivated to find stable accommodation by any means as she sees this as core to her helping Amber and improving her health.</i> 	<ol style="list-style-type: none"> <i>Previous academic record: Amber's previous school record indicates she is very bright and capable of above average academic achievement, it is just a matter of helping her to engage at school.</i> <i>Desire to seek help: Amber wants to feel better. She has spoken with the school counsellor and feels that he may be the only person who can help her showing she is open to accepting his help.</i>

6. CO-EXISTING NEEDS

List and describe the prioritised co-existing needs identified, such as mental health concerns, substance abuse issues, housing instability, employment challenges, etc.

NEED TYPE AND DESCRIPTION

[Approximately 20 words each]

DARCY FREEMAN	AMBER FREEMAN
<ol style="list-style-type: none"> <i>Homelessness: Darcy needs to secure safe and reliable housing for her and Amber.</i> <i>Parenting skills: Darcy needs to learn the knowledge and skills needed to better support her daughter.</i> 	<ol style="list-style-type: none"> <i>Homelessness: Amber needs a safe and reliable home.</i> <i>Support: Amber needs help to manage her emotions and regain some focus at school.</i>

7. SYMPTOMS, DIAGNOSIS (if appropriate) AND PLAN

[Sample reflects an issue that is the same for both clients. See 6. CO-EXISTING NEEDS above for other issues to be supported/addressed in duplicated Section 8. SYMPTOMS, DIAGNOSIS (if appropriate) AND PLAN for each client.]

NEED 1 TYPE:	<i>Homelessness</i>
Symptoms: [Up to 20 words]	<i>Have no secure home. Currently living in temporary housing that is due to expire soon and need somewhere new.</i>
Diagnosis/assessment: <i>Refer to assessment tool/s completed and additional information collected as appropriate.</i> [Up to 120 words]	<p><i>In the Assessment session for Darcy and Amber, this was identified as their combined top priority as their current arrangements are ending soon and they have no immediate options.</i></p> <p><i>In the Homelessness Index completed by Darcy for her and Amber, Darcy indicated that they have been living in temporary accommodation for the last year and they can only stay where they are for another 4 days before this expires.</i></p> <p><i>Darcy is highly motivated to sort this issue as it is a core concern for both her and Amber, and is likely at the core of many of their other issues. Darcy is willing to work in order to financially contribute, as well as complete services such as housekeeping and gardening to secure accommodation as necessary.</i></p>

<p>Urgency/ Priority:</p> <p><i>Is this issue the most important and urgent?</i></p> <p><i>Do any other issues identified create a conflict or ineligibility in terms of action to be taken?</i></p> <p>[Up to 80 words]</p>	<p><i>This issue was identified as the top priority for Darcy and Amber with their current accommodation expiring in 4 days. This creates an urgency that allows for a range of options to be considered.</i></p> <p><i>This issue underpins Darcy's ability to secure work and support her daughter so is fundamental in her improving their situation across the board.</i></p>		
<p>Plan/ Recommendation</p> <p><i>Present 1-2 options</i></p> <p>[Up to 100 words]</p>	<p><i>Engage an organisation that helps people with homelessness to secure temporary accommodation and then work with them to find permanent placements such as the St. Vincent de Paul Society.</i></p> <p><i>Due to the Darcy and Amber's imminent displacement, they are also entitled to new emergency accommodation, in order to give some breathing space to find a more permanent option. This can be done by placing them in a specific facility such as Help A Friend Club Toowoomba Inc.</i></p>		
<p>Risk factors for delivery:</p> <p><i>Identify 2 risks to this plan/ recommendation for consideration.</i></p> <p>[Up to 30 words each]</p>	1.	<p><i>Permanent accommodation based on Darcy working [income] is a challenge while Amber's needs are high as Darcy may be an unreliable employee.</i></p>	
	2.	<p><i>New but temporary accommodation represents additional upheaval and uncertainty for both Darcy and Amber and does not solve the problem.</i></p>	
<p>Supporting organisations:</p> <p><i>Present 2 organisations that support the implementation of this plan/ recommendation.</i></p>	1.	<p>Organisation:</p>	<p><i>St Vincent de Paul Society [SVdPS]</i></p>
		<p>Service offered:</p> <p>[Up to 30 words]</p>	<p><i>SVdPS can help families without a home in the Toowoomba area with accommodation and support to find permanent accommodation through the Family Accommodation Program.</i></p>
		<p>Contact Number:</p>	<p><i>1800 Vinnies (1800 846 643)</i></p>
		<p>Weblink:</p>	<p><i>St Vincent de Paul Society</i></p>
	2.	<p>Organisation:</p>	<p><i>Help a Friend Club Toowoomba Inc [HaFCTI]</i></p>
		<p>Service offered:</p> <p>[Up to 30 words]</p>	<p><i>HaFCTI Offer accommodation and support to those in need through access to specific living facilities and support services.</i></p>
		<p>Contact Number:</p>	<p><i>[07] 4659 9124</i></p>

Weblink:

[Help a Friend Club Toowoomba Inc](#)

9. GOALS

Outline the client's goals, both short-term and long-term, based on the identified needs and strengths.

GOAL TYPE AND GOAL DESCRIPTION

[Up to 30 words each]

DARCY FREEMAN		AMBER FREEMAN	
1. Short term	<i>Find and secure immediate accommodation through St Vincent de Paul Society program.</i>	1. Short term	<i>Find and secure immediate accommodation through St Vincent de Paul Society program.</i>
2. Short term	<i>Attend a parenting course to improve personal skills to support Amber.</i>	2. Short term	<i>Engage school counsellor to help understand and manage emotions.</i>
1. Long term	<i>Maintain long term accommodation and financial stability for self and daughter.</i>	1. Long term	<i>Maintain long term accommodation and financial stability.</i>
2. Long term	<i>Implement improved parenting knowledge and skill to improve support provided to Amber – improving her feelings of safety, security and love.</i>	2. Long term	<i>Use improved understanding of self to re-engage focus at school in order to improve grades and behaviour overall.</i>

10. CLIENT AGREEMENT AND SIGNATURES

(BLANK FOR NOW)

Note: This document outlines a service plan tailored to support the client's needs. It serves as a guideline to consider the co-existing needs of a client and the proposed support plan developed by the assessor.

Task 4: Client outcome meeting

Conduct a meeting with Darcy Freeman to discuss your assessment outcomes and Service Plan recommendations for both Darcy and Amber Freeman.

NOTE: You must print a copy of both completed Service Plan documents developed in Part A Task 3 to bring to the meeting to present to Darcy, update in line with their decisions around recommendations and sign off once agreed in this meeting.

Task: During the outcome session you must:

1. Reintroduce yourself, your role and the assessment outcome process.
2. Confirm you will be recording the session through note taking and ask for the clients approval to do so.
3. Apply a strengths-based approach to the assessment and recommendation process focussed on the clients demonstrated skills, strengths and successes.

4. Present assessment outcomes and recommendations per the Service Plans based on client information collected and the assessment sessions conducted in Part A Task 1.
5. Encourage the client to raise any questions or needs they feel have not been addressed in either set of recommendations.
6. Seek decision-making from the client where multiple recommendations are made and agree outcomes.
7. Confirm implementation process including:
 - a. Reflecting any adjustments on the Service Plans outcomes document (hand write annotations in the recorded session as appropriate).
 - b. Agree responsibilities and encourage the client to advocate on their own behalf, and that of their daughter in accessing the service/s.
 - c. Complete the *Client Agreement and Signatures [section 10]* of the Service Plans and get Darcy to sign for both.
 - d. Gain consent to provide relevant client information such as the Client Intake Form, Service Plans, assessment tools and/or additional information from other sources to support services to be engaged.
8. Outline the *Service handover and monitoring [section 3.3]* process set out in the DZB Services - Service Delivery Policy and Procedure document and schedule the first check in call with Darcy for herself and Amber.

Observable skills: You must demonstrate the following skills during the course of the meeting:

- Conduct a professional meeting with a client so as to present their assessment outcomes and recommendations with a focus on your presentation, language and tone.
- Guide and support the client through the process, allowing for client decision-making and self-advocacy.

Parameters: This meeting must not exceed 10 minutes and must involve 1 additional participant. Details on who to engage and the recording requirements are captured in the Role-Play Instructions.

KEY OBSERVATION CRITERIA

Students are required to engage in a short assessment outcome session with a client to discuss the analysis, process and recommendations for Darcy and Amber Freeman. They are to apply a strengths-based approach to this process and empower the client to make decisions and self-advocate with services to be engaged for herself and her daughter.

An agreement on the service plans must be reached and formalised with next steps laid out.

Participants must address specific requirements as identified in the task, observable skills and **Role-Play Instructions** below.

ROLE-PLAY INSTRUCTIONS

In this task, you will participate in and record a role-play meeting with 1 other participant.

The role-play must not exceed 10 minutes and must address all elements of the Task, Observable skills and Key Observation Criteria set out above.

Resourcing requirements:

In this task you will participate in a role-play meeting with another person. This may be resourced using one of the following options:

1. A peer who you are already working with, within your qualifications industry.

Peer participants will need to state their name and job title at the start of the recording to demonstrate their industry relevance as a participant and inform their consent.

2. A fellow student. Please contact your fellow students via the Discussion Forum and coordinate your role play with them directly.

Student participants will need to state their name and that they are a student (as their job title) at the start of the recording to inform consent.

If you are unable to find a participant to play the role of the other participant, contact your assessor via the Discussion Forum who will discuss options for pairing up with another student to complete this task.

Participant briefing:

You must fully brief all participants prior to the recording, providing them with the context to the role play/meeting, a role outline to play, a copy of the *Task* (including all relevant case study material), *Observable skills* and *Key Observation Criteria* above so that they can prepare for the recording.

Role Outline

- **Number of participants:** 1
- **Role:** Client Darcy Freeman in line with the client information pack referred to in Part A.
- **Gender:** The client Darcy Freeman may be performed by a male or female participant for role play purposes.
- **Contribution:** They must contribute as follows:
 - Attend the session as a client, Darcy Freeman and the parent of a second client, Amber Freeman.
 - Review and understand the client persona as reflected in the following documents:
 - Client profiles – Darcy and Amber Freeman
 - Client Intake Form – Darcy Freeman
 - Informed Consent Form – Darcy Freeman
 - Homelessness Index – Darcy and Amber Freeman
 - Parenting Stress Index – Darcy Freeman
 - Client Intake Form – Amber Freeman
 - Informed Consent Form – Amber Freeman
 - Student Assessment – Amber Freeman
 - Achenback Child Behaviour Checklist – Amber Freeman
 - Additional information provided from additional sources
 - Review and discuss the Service Plans as presented by the student.
 - Contribute to decision making in relation to recommendations made for herself and Amber.
 - Agree to self-advocacy with services to be engaged on behalf of herself and Amber.
 - Confirm agreement with the service plans and sign off both.

Recording instructions

Your role play must be recorded with all participants voices recorded on the one screen.

Once you have logged into your course assessment page, there is the option to record directly into the online platform. Alternatively you may use a system such as Zoom, Skype or Teams to record the session and then load the file on completion.

Consent to participate in the recording must be captured for all participants at the start of the meeting. This is achieved by the student reading the following statement at the start of the recording, with all participants replying their name and job title to inform consent.

“This session/presentation is being recorded for assessment purposes for my course with Swinburne Open Education. This session will be recorded and submitted through my course online learning platform to my Assessor for grading. All participants in this session indicate their consent to be included in this recording by stating their name and job title.”

The time taken to capture consent at the start of the recording does not count towards the recording time limit.

Include this recording as part of your assessment submission.

Assessor instructions: Students must conduct a client assessment outcomes session with 1 participant playing the role of client Darcy Freeman and parent of underage client Amber Freeman. This meeting must not exceed 10 minutes (excluding the participant consent).

Students must complete all elements of the Task, Observable skills and Key Observations Criteria identified above.

Assessors are to indicate result as Satisfactory (S) or Not Yet Satisfactory (NYS) in the Assessor Observation Checklist below.

ASSESSOR OBSERVATION CHECKLIST: Part A, Task 4

Students must demonstrate each of the performance criteria outlined in the observation checklist below.

ACTIVITY	SATISFACTORY	NOT YET SATISFACTORY	ASSESSOR COMMENTS Add comments as appropriate
Delivery checklist			
Recording completed with 1 participant in the role identified.	<input type="checkbox"/>	<input type="checkbox"/>	The student completed the session with 1 other participant, playing the role of a client and parent to client per the case study.
Capture consent of all participants.	<input type="checkbox"/>	<input type="checkbox"/>	The student captured consent of all parties to the role play recording.
Recording completed within the timeframe allocated.	<input type="checkbox"/>	<input type="checkbox"/>	The student recorded the session within the timeframe allocated (excluding participant consent time).

Task checklist

1. Reintroduce yourself, your role and the assessment outcome process.	<input type="checkbox"/>	<input type="checkbox"/>	The student must: <ul style="list-style-type: none"> • Reintroduce themselves, • outline their role as Case Worker at DZB Services • outline the assessment outcome process.
2. Confirm you will be recording the session through note taking and ask for the clients approval to do so.	<input type="checkbox"/>	<input type="checkbox"/>	The student must confirm they will be taking notes and gain clients verbal consent to do so.
3. Apply a strengths-based approach to the assessment and recommendations process focused on the clients demonstrated skills, strengths, and successes.	<input type="checkbox"/>	<input type="checkbox"/>	The student participated in a strengths-based assessment process incorporating the following: <ul style="list-style-type: none"> • Collaboratively engaging the client • Identifying client skills, talents and resources • Highlighting positive behaviours such as initiative, resilience and problem-solving. • Use of positive language. • Reference to assessment tool outcomes in line with priorities identified. <p>The students recommendations must reference the clients skills, strengths and successes. For Darcy this could be her love for her daughter and desire to find ways to support her. For Amber this could be her previous academic and behavioural record indicating a bright mind in a sweet girl, or more recently her interest in reaching out to the school counsellor.</p>
4. Present assessment outcomes and recommendations based on client information collected and the assessment session conducted in Part A Task 1 for Darcy and Amber Freeman.	<input type="checkbox"/>	<input type="checkbox"/>	The student must present the recommendations made based on the clients issue identification and priorities and the information included in the client pack.
5. Encourage the client to raise any questions or needs they feel have not been addressed.	<input type="checkbox"/>	<input type="checkbox"/>	The student must encourage the client to ask any questions they may have as appropriate.
6. Seek decision-making from the client where multiple recommendations are made and agree outcomes.	<input type="checkbox"/>	<input type="checkbox"/>	The student must seek a decision on the recommendations from the client in line with their needs and preferences. An agreement must be reached.
7. Confirm implementation process including:			
a. Reflect any adjustments on the Service Plans outcomes documents (handwritten annotations in the recorded session as appropriate).	<input type="checkbox"/>	<input type="checkbox"/>	The student must capture notes on any changes or decisions made on the paper copies of the Service Plans in line with the clients agreement.
b. Agree responsibilities and encourage the client to advocate on behalf of	<input type="checkbox"/>	<input type="checkbox"/>	The student must discuss the clients responsibilities in engaging the services identified in order to promote self-advocacy.

themselves and their daughter in accessing the service/s.			
c. Complete the Client Agreement and Signatures (section 10) of the 2 Service Plans.	<input type="checkbox"/>	<input type="checkbox"/>	The student must capture the clients signature on the marked up copy of the Service Plan Client Agreement and signature section in line with their agreement for Darcy and Amber's Service Plans. The student should also sign both documents.
d. Gain consent to provide relevant client information such as the Service Plan, assessment tools and/or additional information from other sources to support services to be engaged.	<input type="checkbox"/>	<input type="checkbox"/>	The student must gain verbal consent from the client to send any relevant records to the services chosen for their reference.
8. Outline the Service handover and monitoring (3.4) process set out in the DZB Services Assessment and Service Delivery Policy and Procedure document and schedule the first check in call with Darcy on behalf of herself and her daughter.	<input type="checkbox"/>	<input type="checkbox"/>	The student must outline the next steps in the process per the policy and procedure provided, including: <ul style="list-style-type: none"> • Schedule a phone check in with the client in 4 weeks. • Notify the client you the student will "Schedule a face to face or phone check in with the client in 12 weeks." • Notify the client you the student will "Circulate a Client satisfaction survey to capture the clients satisfaction with the services provided by DZB and their Case Worker, the Service Plan agreed and the support received from the referred services."

Skills checklist

Conduct a professional meeting with a client so as to present the assessment outcomes and recommendations for themselves and their daughter, with a focus on their presentation, language and tone.	<input type="checkbox"/>	<input type="checkbox"/>	Students must be well presented and use appropriate language and tone in their interaction with the client.
Guide and support the client through the process, allowing for client decision-making and self-advocacy.	<input type="checkbox"/>	<input type="checkbox"/>	The student guided their client through the process, encouraging them to make decisions and advocate for themselves.

Task 5: Client outcome documentation

Scan and paste a copy of the *Client Agreement and Signatures* sections of the Service Plans for Darcy Freeman and Amber Freeman below as completed in the Assessment Outcomes session in Part A Task 4.

Assessor instructions: Students must paste a copy of the Client Agreement and Signatures section of the Service Plan for Darcy and Amber Freeman below as completed in the Assessment Outcomes session complete with Client and Assessor details and signatures.

A sample answer is provided below however this must be an actual scan of a manually updated document.

<<Paste a screen shot of the Client Agreement and Signed section of Darcy Freeman's Service Plan here.>>

CLIENT AGREEMENT AND SIGNATURES

I, Darcy Freeman [Client's Full Name], acknowledge that I have reviewed and discussed the contents of this assessment report with my assessor. I understand the goals, interventions, and referrals outlined and agree to actively participate in the proposed support plan.

Client's Name: *Darcy Freeman*

Client's Signature: *Darcy Freeman*

Date: <<Date>>

Assessor's Name: <<Students name>>

Assessor's Signature: <<Students signature>>

Date: <<Date>>

<<Paste a screen shot of the Client Agreement and Signed section of Amber Freeman's Service Plan here.>>

10. CLIENT AGREEMENT AND SIGNATURES

I, Darcy Freeman [Parent/ Guardian's Name], on behalf of Amber Freeman [Client's Full Name], acknowledge that I have reviewed and discussed the contents of this assessment report with the assessor. I understand the goals, interventions, and referrals outlined and agree to actively participate in the proposed support plan.

Client's name: *Amber Freeman*

Parent/ Guardian name: *Darcy Freeman*

Parent/ Guardian signature: *Darcy Freeman*

Date signed: <<Date>>

Assessor's Name: <<Students name>>

Assessor's Signature: <<Students signature>>

Date: <<Date>>

Part B: Evaluate assessment and referral processes

CASE STUDY:

You are a Case Worker at DZB Services, an organisation dedicated to bridging the gap between clients in need and community and mental health support services.

DZB Services aims to facilitate seamless connections between clients requiring assistance and a network of community services and mental health support providers. By acting as a bridge, we streamline the process, ensuring timely access to appropriate services.

A new family has been referred to you for wholistic community services and mental health support. You have been asked to complete the post referral monitoring, reflect and feedback processed for this client.

Review the following client information pack for Darcy Freeman for Part B:

- Client profiles – Darcy and Amber Freeman
- Client Intake Form – Darcy Freeman
- Informed Consent Form – Darcy Freeman
- Homelessness Index – Darcy and Amber Freeman
- Parenting Stress Index – Darcy Freeman
- Additional information provided from additional sources

Task 1: Coordinate client check in call

Conduct a 4-week post-Service Plan check in phone call with Darcy Freeman in relation to her assessment, Service Plan (as completed in Part B Task 4) and support overall.

Task: During the call you must:

1. Reintroduce yourself.
2. Ask Darcy how she is going overall.
3. Ask for feedback on the following:
 - a. Effectiveness of the Service Plan recommendation and referrals in helping to address Darcy's identified issues.
 - b. Any priority areas of concern for Darcy that are not being addressed and what can be done.
 - c. Any support service providers engaged by Darcy as part of her Service Plan.
 - d. Darcy's satisfaction with the DZB Services Assessment Process overall.
 - e. Darcy's satisfaction with you as her Case Worker.
4. Next steps related to any issues not addressed as part of Darcy's Services Plan as set out, or new priority issues that have been identified, per the *Service handover and monitoring* process (section 3.3) of the DZB Services – Service Delivery Policy and Procedure for Darcy.

Observable skills: You must demonstrate the following skills during the course of the phone call:

- Use questioning and active listening to seek and understand feedback provided by the client.
- Respond appropriately to feedback and additional or unmet needs identified.

Parameters: This call must not exceed 5 minutes and must involve 1 additional participant. Details on who to engage and the recording requirements are captured in the Role-Play Instructions.

KEY OBSERVATION CRITERIA

Students are required to engage in a short phone conversation between themselves as a Case Worker and Darcy Freeman. During this call they must seek and capture feedback on the process, the support services referred and your support as Case Worker.

Clients must be given the opportunity to identify any areas of priority that have not been appropriately met or have arisen to allow the Case Worker to provide alternative or new solutions, or to re-engage them in a full assessment review process.

Participants must address specific requirements as identified in the task in line with the **Role-Play Instructions** below.

ROLE-PLAY INSTRUCTIONS

In this task, you will participate in and record a role/play phone call with 1 other participant.

The role-play must not exceed 5 minutes and must address all elements of the task instructions and Key Observation Criteria set out above.

Resourcing requirements:

In this task you will participate in a role-play phone call with another person. This may be resourced using one of the following options:

1. A peer who you are already working with, within your qualifications industry.

Peer participants will need to state their name and job title at the start of the recording to demonstrate their industry relevance as a participant and inform their consent.

2. A fellow student. Please contact your fellow students via the Discussion Forum and coordinate your role play with them directly.

Student participants will need to state their name and that they are a student (as their job title) at the start of the recording to inform consent.

If you are unable to find someone to play the role of the other participant, contact your assessor via the Discussion Forum who will discuss options for pairing up with another student to complete this task.

Participant briefing:

You must fully brief all participants prior to the recording, providing them with the context to the role play/meeting, a role outline to play, a copy of the *Task* (including all relevant case study material), *Observable skills* and *Key Observation Criteria* above so that they can prepare for the recording.

Role Outline

- **Number of participants:** 1
- **Role:** Client Darcy Freeman in line with the client information pack referred to in Part A.

- **Gender:** The client Darcy Freeman may be performed by a male or female participant for role play purposes.
- **Contribution:** They must contribute as follows:
 - Attend the session as the client, Darcy Freeman.
 - Review and understand the client persona as reflected in the following documents:
 - Client profiles – Darcy and Amber Freeman
 - Client Intake Form – Darcy Freeman
 - Additional information provided from additional sources
 - Service Plan – Darcy Freeman [per Part A Task 3]
 - Review and discuss their experiences since the completion of the Service Plan. This should be positive overall, however must identify at least 1 opportunity to revise or update the Service Plan to achieve a better outcome, whether through identification of a need not being met as intended or a new need taking priority.
 - Provide feedback on the service providers, the Assessment process and the Case Worker in relation to the effectiveness of the Service Plan outcomes and experience overall.

Recording instructions

Your role play must be recorded with all participants voices recorded together.

Once you have logged into your course assessment page, there is the option to record directly into the online platform. Alternatively you may use a system such as Zoom, Skype or Teams to record the session and then load the file on completion.

Consent to participate in the recording must be captured for all participants at the start of the meeting. This is achieved by the student reading the following statement at the start of the recording, with all participants replying their name and job title to inform consent.

“This session/presentation is being recorded for assessment purposes for my course with Swinburne Open Education. This session will be recorded and submitted through my course online learning platform to my Assessor for grading. All participants in this session indicate their consent to be included in this recording by stating their name and job title.”

The time taken to capture consent at the start of the recording does not count towards the recording time limit.

Include this recording as part of your assessment submission.

Assessor instructions: Students must conduct a simulated phone call to conduct a 4-week post-Service Plan delivery check in phone call with Darcy Freeman on behalf of herself and her daughter Amber Freeman. This phone call must not exceed 5 minutes [excluding the participant consent].

Students must complete all elements of the Task, Observable skills and Key Observations Criteria identified above.

Assessors are to indicate result as Satisfactory [S] or Not Yet Satisfactory [NYS] in the Assessor Observation Checklist below.

ASSESSOR OBSERVATION CHECKLIST: Part B, Task 1

Students must demonstrate each of the performance criteria outlined in the observation checklist below.

ACTIVITY	SATISFACTORY	NOT YET SATISFACTORY	ASSESSOR NOTE/COMMENTS Add comments as appropriate
Delivery checklist			
Recording completed with 1 participant in the role identified.	<input type="checkbox"/>	<input type="checkbox"/>	The student completed the session with 1 other participant, playing the role of a client per the case study.
Capture consent of all participants.	<input type="checkbox"/>	<input type="checkbox"/>	The student captured consent of all parties to the role play recording.
Recording completed within the timeframe allocated.	<input type="checkbox"/>	<input type="checkbox"/>	The student recorded the session within the timeframe allocated (excluding participant consent time).
Task checklist			
1. Reintroduce yourself.	<input type="checkbox"/>	<input type="checkbox"/>	The student reintroduced themselves to the client.
2. Ask Darcy how she is going overall.	<input type="checkbox"/>	<input type="checkbox"/>	The student enquired as to how Darcy has been feeling overall since the Service Plan was delivered.
3. Ask for feedback on the following: a. Effectiveness of the Service Plan recommendation and referrals in helping to address Darcy's identified issues. b. Any priority areas of concern for Darcy that are not being addressed and what can be done. c. Any support service providers engaged by Darcy as part of her Service Plan. d. Darcy's satisfaction with the DZB Services Assessment Process overall. e. Darcy's satisfaction with you as her Case Worker.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Ask the client for feedback on the effectiveness of the Service Plan in addressing the priority issues identified. Ask the client for information on how they are going and identifying any areas of assistance required. Ask the client for feedback on support service providers as engaged per the Service Plan. Ask the client for feedback on the DZB Services Assessment Process as conducted. Ask the client for feedback on the student as the Case Worker regarding their support, recommendations and follow up.
4. Next steps related to any issues not addressed as part of Darcy's Services Plan as set out, or new priority issues that have been identified, per the Service handover and monitoring process (section 3.3) of the DZB Services – Service Delivery Policy and Procedure for Darcy.	<input type="checkbox"/>	<input type="checkbox"/>	Outline the next steps in relation to outstanding or new issues per the DZB Services – Service Delivery and Policy and Procedure document. "Should any issue not be addressed as part of the Service Plan set out, or new priority issues be identified in any of the check in or feedback processes above, the Case Manager should offer to set a time to revise and review the Service Plan to take these issues into account."

Skills checklist			
• Use questioning and active listening to seek and understand feedback provided by the client.	<input type="checkbox"/>	<input type="checkbox"/>	Use questioning and listening skills to seek feedback from the client, ensuring that you understand any issues or blockers experienced through the process.
• Respond appropriately to feedback and additional or unmet needs identified.	<input type="checkbox"/>	<input type="checkbox"/>	Respond appropriately to concerns around unmet needs or new priority issues raised by the client by offering to revise and review the Service Plan to support the client.

Task 2: Reflection and self-evaluation

Reflect on your assessment process with Darcy Freeman and undertake a self-evaluation by considering what you did well and what you could improve based on the following aspects of your performance:

- Assessment session with the client:
 - Inform the client of the assessment process.
 - Collect client information to consider in the assessment process.
 - Empowered the client to identify and prioritise their needs.
 - Reassure and support the client.
- Assessment processing and Service Plan development:
 - Apply a strengths-based approach to assessment.
 - Evaluate the needs of the client using all sources of information available.
 - Identify and analyse complex, multiple and interrelated issues.
 - Evaluate appropriateness of services based on urgency and eligibility.
 - Assess the benefits and potential risk factors for internal and external service delivery options.
- Assessment outcome session with the client:
 - Present appropriate recommendations to the client, reflective of their priorities and needs.
 - Encourage the client to make decisions relation to their care.
 - Encourage the client to self-advocate in engaging services.

Identify at least 1 thing that was done well and 1 area that could be improved for each of the 3 assessment process components listed.

Assessor instructions: Students must complete a self-reflection process based on how they managed the assessment process for Darcy Freeman. Students must provide commentary on what they did well and what they could improve for each of the processes identified.

Sample answers are provided below. Students answers may vary, but they must reflect self-evaluation based on their performance in managing Darcy Freeman’s assessment as captured in Part A of this assessment.

ASSESSMENT PROCESS COMPONENTS	SELF-EVALUATION	
	What was done well and what could be done better? [Approximately 40 words each]	
Assessment session with the client: <ul style="list-style-type: none"> • Inform the client of the assessment process. 	Done well:	<p>I effectively informed Darcy Freeman about the assessment process, ensuring she understood the steps involved.</p> <p>This clarity likely contributed to her engagement and agreement to implement recommendations.</p>

<ul style="list-style-type: none"> • Collect client information to consider in the assessment process. • Empowered the client to identify and prioritise their needs. • Reassure and support the client. 	Could do better:	While I collected and considered Darcy's client information as received, there may be an opportunity to enhance the depth of information gathered by exploring additional questions to uncover more nuances and factors affecting Darcy's situation, such as those around her family or Amber's father.
<p>Assessment processing and Service Plan development:</p> <ul style="list-style-type: none"> • Apply a strengths-based approach to assessment. • Evaluate the needs of the client using all sources of information available. • Identify and analyse complex, multiple and interrelated issues. • Evaluate appropriateness of services based on urgency and eligibility. • Assess the benefits and potential risk factors for internal and external service delivery options. 	Done well:	<p>Applying a strengths-based approach demonstrated my understanding of Darcy's worth and my commitment to empowering her.</p> <p>This positive framework likely fostered a sense of agency and resilience in her approach to addressing challenges.</p>
	Could do better:	My evaluation of Darcy's needs using all available sources could be expanded to explicitly involving Darcy in this process, ensuring her perspective is actively integrated into the assessment.
<p>Assessment outcome session with the client:</p> <ul style="list-style-type: none"> • Present appropriate recommendations to the client, reflective of their priorities and needs. • Encourage the client to make decisions relation to their care. • Encourage the client to self-advocate in engaging services. 	Done well:	<p>Presenting appropriate recommendations reflective of Darcy's priorities showcased a tailored and client-focused approach.</p> <p>This likely contributed to her feeling heard, supported and positive about her potential.</p>
	Could do better:	While encouraging Darcy to make decisions is essential, further emphasis on providing resources or guidance for self-advocacy could strengthen her ability to engage with services independently.

Task 3: Seek feedback

Complete the 6 month feedback collection process for client Darcy Freeman, and a service provider engaged through Darcy's Service Plan delivered in Part A Task 3/ Appendix A.


Follow the *Seek feedback process (section 5.2)* of the DZB Services – Service Delivery Policy and Procedure document.

Each communication must be positive and professional and include the following information:

- Introduce yourself by name and role.
- Reminding them of the interaction you are seeking feedback for.
- Ask them to participate in a feedback process so that you may reflect on and improve the Assessment process, client referral process and your own professional practice.
- Copy the relevant survey into the communication.
- Ask them to complete the relevant satisfaction survey and return it to you within 1 week.

Capture this communication in the email templates below.

[Approximate word count: 200 words in the body of each email, excluding the survey component]

Email Template Client Feedback	
To:	<<Add name[s] and position title of main email recipients here>>
From:	<<Name>>@dzbservices.org.au
CC:	<<Add names and position title of carbon copy email recipients here (leave blank if none)>>
Date/time:	<<Add the time and date of the email here>>
Subject:	<<Add the subject of the email here>>
Attachments:	<<Add the name of any attachments here (leave blank if none)>>
<p>To <<Add email recipient[s] name here>>,</p> <p><<Add message here. Add as much space as necessary.>></p> <p>Kind regards,</p>	
 <p><<Student name>> Case Worker 1 Woodstream Pl, Brookvale NSW 2100 Phone: 02 9988 7766 http://www.dzbservices.org.au</p>	

Email Template Service Provider Feedback	
To:	<<Add name[s] and position title of main email recipients here>>
From:	<<Name>>@dzbservices.org.au
CC:	<<Add names and position title of carbon copy email recipients here (leave blank if none)>>
Date/time:	<<Add the time and date of the email here>>
Subject:	<<Add the subject of the email here>>
Attachments:	<<Add the name of any attachments here (leave blank if none)>>

To <<Add email recipient[s] name here>>,
 <<Add message here. Add as much space as necessary.>>
 Kind regards,



<<Student name>>
 Case Worker
 1 Woodstream Pl, Brookvale NSW 2100
 Phone: 02 9988 7766
<http://www.dzbservices.org.au>

Assessor instructions: Students must draft 2 email communications seeking feedback from:

1. Client Darcy Freeman
2. A Service Provider engaged through Darcy Freeman’s Service Plan.

Each of these emails must actively seek feedback on a recent interaction, in line with the clients management throughout this assessment.

Each communication must be positive and professional and include the following information:

- Introduce themselves by name and role.
- Reminding them of the interaction they are seeking feedback for.
- Ask them to participate in a feedback process so that students may reflect on and improve the Assessment process, client referral process and their own professional practice.
- Copy the relevant survey into the communication per the DZB Services – [Service Delivery Policy and Procedure](#) document.
- Ask them to complete the relevant satisfaction survey and return it to you within 1 week.

A sample answer for each contact is provided below. Students answers will vary, however they must be targeted to each relationship, incorporate the feedback survey, invite feedback and address all other elements captured in the assessor instructions.

Email Template Client Feedback	
To:	<i>Darcy Freeman [DarcyF98@gmail.com.au]</i>
From:	<i><<Name>>@dzbservices.org.au</i>
CC:	
Date/time:	<i>10:00am xx/xx/xx</i>
Subject:	<i>Assessment and referral process feedback</i>
Attachments:	
To <i>Darcy,</i> <i>I hope this email finds you well.</i>	

As you would remember, I recently completed an assessment and referral process for you and your daughter. It has now been 6 months and I wanted to reach out to request your participation in a feedback process to determine the effectiveness and efficiencies of the assessment and referral process that was followed.

Your feedback is incredibly valuable in helping me gain insight into the effectiveness of my support and identify areas where the process and my support can enhance the experience for yourself and our client.

Please use the feedback form attached to capture your experience. The survey includes a series of questions to rate your thoughts and experiences during our interaction. Please take a few moments to complete the survey.

Client Satisfaction Survey

Please complete the following 5 client feedback questions as they relate to your recent assessment process. This feedback will be used by your Case Worker to reflect on and improve the assessment process, clients outcomes and their own performance.

Please indicate your level of agreement for each statement by placing an x under the appropriate number on the scale provided.	1 Strongly disagree	2 Disagree	3 Neither agree not disagree	4 Agree	5 Strongly agree
1. The Case Worker helped me to identify and prioritise my concerns and needs.					
2. The Case Worker allowed me to make decisions and self-advocate through the process.					
3. The Case Worker as well as the DZB Services assessment and outcome processed was logical and supportive.					
4. The assessment outcome recommendations were appropriate to support and address my needs and priorities.					
5. Overall, I am satisfied with the support and assistance provided by the Case Worker.					

Please add any other comments or feedback you would like to provide in the space below.

Please return this completed feedback by reply email to your Case Worker.

Please complete the above survey and return it to me within one week. Your feedback is important to me, and I appreciate your time and willingness to participate in this process.

Should you have any questions or concerns regarding the survey or the feedback process, please do not hesitate to reach out to me. I am here to provide any assistance or clarification you may need.

Kind regards,



<<Student name>>
 Case Worker
 1 Woodstream Pl, Brookvale NSW 2100
 Phone: 02 9988 7766
<http://www.dzbservices.org.au>

Email Template Service Provider Feedback

To:	<<Add name[s] and position title of main email recipients here>>
From:	<<Name>>@dzbservices.org.au
CC:	
Date/time:	10:00am xx/xx/xx
Subject:	Assessment and referral process feedback
Attachments:	

To <<Service Provider>>,

I hope this email finds you well. My name is <<Name>>, and I recently completed an assessment and referral process for client Darcy Freeman. It has now been 6 months and I wanted to reach out to request your participation in a feedback process to determine the effectiveness and efficiencies of the assessment and referral process that was followed.

Your feedback is incredibly valuable in helping me gain insight into the effectiveness of my support and identify areas where the process and my support can enhance the experience for yourself and our client.

Please use the feedback form attached to capture your experience. The survey includes a series of questions to rate your thoughts and experiences during our interaction. Please take a few moments to complete the survey.

Service Provider Satisfaction Survey					
Please complete the following 5 service provider feedback questions as they relate to a recent client assessment and referral process. This feedback will be used by the referring Case Worker to reflect on and improve the assessment process, clients outcomes and their own performance.					
Please indicate your level of agreement for each statement by placing an x under the appropriate number on the scale provided.	1 Strongly disagree	2 Disagree	3 Neither agree not disagree	4 Agree	5 Strongly agree
1. The Case Workers assessment of the client was accurate and helpful in identifying the support they needed.					
2. The Case Workers assessment outcome recommendations were appropriate for the client's needs.					
3. The referral and handover process from the Case Worker was logical and helpful.					
4. The Case Worker encouraged the client to self-advocate which helped build our relationship in a helpful way.					
5. Overall, I am satisfied with the assessment and referral process from the Case Worker.					

Please add any other comments or feedback you would like to provide in the space below.

Please return this completed feedback by reply email to your clients Case Worker.

Please complete the above survey and return it to me within one week. Your feedback is important to me, and I appreciate your time and willingness to participate in this process.

Should you have any questions or concerns regarding the survey or the feedback process, please do not hesitate to reach out to me. I am here to provide any assistance or clarification you may need.

Kind regards,



<<Student name>>

Case Worker
1 Woodstream Pl, Brookvale NSW 2100
Phone: 02 9988 7766
<http://www.dzbservices.org.au>

Task 4: Review and assess feedback

CASE STUDY:

You recently commenced an evaluation for the assessment and referral process relating to your client, Darcy Freeman. This process included:

- Contacting the client to discuss the effectiveness of the support she received 4 weeks after completing her assessment and Service Plan (Part B Task 1).
- Conducting a self-evaluation on the services you provided to the client (Part B Task 2).
- Seeking feedback from the client and a service provider the client was referred to via a satisfaction survey (Part B Task 3).

You received the following feedback from the client and service provider contacted.

Client Satisfaction Survey

Please complete the following 5 client feedback questions as they relate to your recent assessment process. This feedback will be used by your Case Worker to reflect on and improve the assessment process, clients outcomes and their own performance.

Please indicate your level of agreement for each statement by placing an x under the appropriate number on the scale provided.

1
Strongly
disagree

2
Disagree

3
Neither
agree not
disagree

4
Agree

5
Strongly
agree

1. The Case Worker helped me to identify and prioritise my concerns and needs.					X
2. The Case Worker allowed me to make decisions and self-advocate through the process.					X
3. The Case Worker as well as the DZB Services assessment and outcome processed was logical and supportive.					X
4. The assessment outcome recommendations were appropriate to support and address my needs and priorities.				X	
5. Overall, I am satisfied with the support and assistance provided by the Case Worker.					X

Please add any other comments or feedback you would like to provide in the space below.

The recommendations were appropriate; however I did have to go into additional temporary housing before finding a more permanent solution. This was not ideal, although I am honestly not sure there was an alternative at that point.

I am now working part-time and able to maintain a small apartment for Amber and I and we are both doing much better physically and mentally, with Amber's grades slowly improving as we work on this together.

Please return this completed feedback by reply email to your Case Worker.

Service Provider Satisfaction Survey

Please complete the following 5 service provider feedback questions as they relate to a recent client assessment and referral process. This feedback will be used by the referring Case Worker to reflect on and improve the assessment process, clients outcomes and their own performance.

Please indicate your level of agreement for each statement by placing an x under the appropriate number on the scale provided.	1 Strongly disagree	2 Disagree	3 Neither agree not disagree	4 Agree	5 Strongly agree
1. The Case Workers assessment of the client was accurate and helpful in identifying the support they needed.					X
2. The Case Workers assessment outcome recommendations were appropriate for the client's needs.					X
3. The referral and handover process from the Case Worker was logical and helpful.				X	

4. The Case Worker encouraged the client to self-advocate which helped build our relationship in a helpful way.			X		
5. Overall, I am satisfied with the assessment and referral process from the Case Worker.				X	

Please add any other comments or feedback you would like to provide in the space below.

The Case Worker did well to assess the clients' needs and identify potential solutions. The paperwork they collected was also helpful in ensuring I could hit the ground running.

In terms of self-advocacy however, the client clearly struggled with what this meant, adding pressure to her when she was already under an extreme amount of pressure.

Thankfully I had everything I needed from the Case Worker themselves, but it is worth considering the value of this focus on a client's care.

Please return this completed feedback by reply email to your clients Case Worker.

Review and reflect on the feedback collected by the processes outlined above. Use this feedback and self-reflection to identify 2 opportunities to improve the assessment process. There must be 1 opportunity to improve the process for the client and 1 opportunity to improve the process for the service provider.

Assessor instructions: Students must assess the feedback and self-reflection captured through the processes across Part B and identify 2 opportunities to improve the assessment process, 1 for the client and 1 for the service provider.

Sample answers are provided below. Students answers may vary, however they need to reflect opportunities to improve the process for the client and service provider based on their feedback provided.

STAKEHOLDER	PROCESS IMPROVEMENT OPPORTUNITY [Approximately 80 words each]
Client	<p><i>The client's transition involved temporary housing, and while the recommendations were appropriate, there may have been impacts not considered in the assessments.</i></p> <p><i>The process could benefit from establishing a more hands on system for regular check-ins with clients during transitional phases to ensure urgent issues and emerging challenges are handled promptly with the help of the Case Worker, who best knows the client at this stage. This proactive approach can address issues before they escalate and lead to potential setbacks.</i></p>
Service provider	<p><i>The client struggled with the concept of self-advocacy, adding pressure during an already challenging time.</i></p> <p><i>The assessment process could benefit from developing and providing resources or workshops to clients to help them to understanding and learn practical skills relating to self-advocacy. This could include clear guidelines and examples to empower clients to navigate services independently now and into the future, also improving the experience for the service providers engaged.</i></p>

Assessment checklist:

Students must have completed all tasks within this assessment before submitting. This includes:

Part A: Assess client needs		
1.	Client assessment meeting – Meeting role play recording/s	<input type="checkbox"/>
2.	Seek colleague input – 1 x email	<input type="checkbox"/>
3.	Client service plans and recommendations – Service Plan templates	
	Darcy Freeman – Appendix A	<input type="checkbox"/>
	Amber Freeman – Appendix B	<input type="checkbox"/>
4.	Client assessment outcome meeting – Meeting role play recording	<input type="checkbox"/>
5.	Client assessment outcome documentation – Screenshot of approval	<input type="checkbox"/>
Part B: Evaluate assessment and referral process		
1.	Conduct client check in and feedback collection – Phone call role play recording	<input type="checkbox"/>
2.	Conduct self-evaluation – Table	<input type="checkbox"/>
3.	Seek feedback from client and other sources – 2 x email	<input type="checkbox"/>
4.	Identify process improvements based on feedback - Table	<input type="checkbox"/>



Congratulations you have reached the end of Assessment 3!

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**ASSESSMENT OUTCOMES****Service Plan**

DZB Services representatives complete the following template in order to capture and report on client Assessment Outcomes and the Service Plan as agreed with the client.

NOTE: All information provided in this form and subsequently discussed will remain confidential.

PERSONAL INFORMATION	
Client's Full Name:	<i>Darcy Freeman</i>
Preferred Name:	
Date of Birth:	
Gender:	
Address:	
Contact Number:	
Email Address:	

EMERGENCY CONTACT INFORMATION	
Name:	
Relationship:	
Phone Number:	

ASSESSMENT SESSION DETAILS	
Initial assessment date:	
Last assessment date:	

ASSESSMENT SUMMARY
Provide a concise summary of the client's current situation, highlighting key strengths, challenges, and co-existing needs identified during the assessment process.

[Approximately 120 words]

STRENGTHS

Identify the client's strengths, skills, and positive attributes observed during the assessment.

STRENGTH TYPE		STRENGTH DESCRIPTION (Up to 70 words each)
1.		
2.		

CO-EXISTING NEEDS

List and describe the prioritised co-existing needs identified, such as mental health concerns, substance abuse issues, housing instability, employment challenges, etc.

NEED TYPE		NEED DESCRIPTION (Up to 20 words each)
1.		
2.		

NEED 1: SYMPTOMS, DIAGNOSIS (if appropriate) AND PLAN

NEED 1 TYPE:	
Symptoms: (Up to 20 words)	
Diagnosis/ assessment: <i>Refer to assessment tool/s completed and additional information collected as appropriate.</i> (Up to 120 words)	
Urgency/ Priority:	

<p><i>Is this issue the most important and urgent?</i></p> <p><i>Do any other issues identified create a conflict or ineligibility in terms of action to be taken?</i></p> <p>[Up to 80 words]</p>			
<p>Plan/ Recommendation</p> <p><i>Present 1-2 options</i></p> <p>[Up to 100 words]</p>			
<p>Risk factors for delivery:</p> <p><i>Identify 2 risks to this plan/ recommendation for consideration.</i></p> <p>[Up to 30 words each]</p>	1.		
	2.		
<p>Supporting organisations:</p> <p><i>Present 2 organisations that support the implementation of this plan/ recommendation.</i></p>	1.	Organisation:	
		Service offered: [Up to 30 words each]	
		Contact Number:	
		Weblink:	
	2.	Organisation:	
		Service offered: [Up to 30 words each]	
		Contact Number:	
		Weblink:	

NEED 2: SYMPTOMS, DIAGNOSIS (if appropriate) AND PLAN

NEED 2 TYPE:	
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Symptoms: [Up to 20 words]			
Diagnosis/ assessment: <i>Refer to assessment tool/s completed and additional information collected as appropriate.</i> [Up to 120 words]			
Urgency/ Priority: <i>Is this issue the most important and urgent?</i> <i>Do any other issues identified create a conflict or ineligibility in terms of action to be taken?</i> [Up to 80 words]			
Plan/ Recommendation <i>Present 1-2 options</i> [Up to 100 words]			
Risk factors for delivery: <i>Identify 2 risks to this plan/ recommendation for consideration.</i> [Up to 30 words each]	1.		
	2.		
Supporting organisations: <i>Present 2 organisations that support the implementation of this plan/ recommendation.</i>	1.	Organisation:	
		Service offered: [Up to 30 words each]	
		Contact Number:	
		Weblink:	
	2.	Organisation:	

	Service offered: [Up to 30 words each]	
	Contact Number:	
	Weblink:	

GOALS

Outline the client's goals, both short-term and long-term, based on the identified needs and strengths.

GOAL TYPE		GOAL DESCRIPTION [Up to 30 words each]
1.	Short term goal	
2.	Short term goal	
1.	Long term goal	
2.	Long term goal	

CLIENT AGREEMENT AND SIGNATURES

I, _____ [Client's Full Name], acknowledge that I have reviewed and discussed the contents of this assessment report with my assessor. I understand the goals, interventions, and referrals outlined and agree to actively participate in the proposed support plan.

Client's Name:	
Client's Signature:	
Date:	
Assessor's Name:	
Assessor's Signature:	
Date:	

Note: This document outlines a service plan tailored to support the client's needs. It serves as a guideline to consider the co-existing needs of a client and the proposed support plan developed by the assessor.





ASSESSMENT OUTCOMES

Service Plan - Minor

DZB Services representatives complete the following template in order to capture and report on client Assessment Outcomes and the Service Plan as agreed with the client.

NOTE: All information provided in this form and subsequently discussed will remain confidential.

CHILD'S PERSONAL INFORMATION

Full Name:	<i>Amber Freeman</i>
Preferred Name:	
Date of Birth:	
Gender:	
Address:	

PARENT/ GUARDIAN INFORMATION

Name:	
Relationship:	
Date of Birth:	
Gender:	
Address:	
Contact Number:	
Email Address:	

ASSESSMENT SESSION DETAILS

Initial assessment date:	
Last assessment date:	



ASSESSMENT SUMMARY

Provide a concise summary of the client's current situation, highlighting key strengths, challenges, and co-existing needs identified during the assessment process.

[Approximately 120 words]

STRENGTHS

Identify the client's strengths, skills, and positive attributes observed during the assessment.

STRENGTH TYPE		STRENGTH DESCRIPTION [Up to 70 words each]
3.		
4.		

CO-EXISTING NEEDS

List and describe the prioritised co-existing needs identified, such as mental health concerns, substance abuse issues, housing instability, employment challenges, etc.

NEED TYPE		NEED DESCRIPTION [Up to 20 words each]
3.		
4.		

NEED 1: SYMPTOMS, DIAGNOSIS (if appropriate) AND PLAN

NEED 1 TYPE:	
Symptoms: [Up to 20 words]	
Diagnosis/ assessment: <i>Refer to assessment tool/s completed and additional information</i>	

<p><i>collected as appropriate.</i></p> <p>(Up to 120 words)</p>			
<p>Urgency/ Priority:</p> <p><i>Is this issue the most important and urgent?</i></p> <p><i>Do any other issues identified create a conflict or ineligibility in terms of action to be taken?</i></p> <p>(Up to 80 words)</p>			
<p>Plan/ Recommendation</p> <p><i>Present 1-2 options</i></p> <p>(Up to 100 words)</p>			
<p>Risk factors for delivery:</p> <p><i>Identify 2 risks to this plan/ recommendation for consideration.</i></p> <p>(Up to 30 words each)</p>	1.		
	2.		
<p>Supporting organisations:</p> <p><i>Present 2 organisations that support the implementation of this plan/ recommendation.</i></p>	1.	Organisation:	
		Service offered: (Up to 30 words each)	
		Contact Number:	
		Weblink:	
	2.	Organisation:	
		Service offered: (Up to 30 words each)	
		Contact Number:	
		Weblink:	

NEED 2: SYMPTOMS, DIAGNOSIS (if appropriate) AND PLAN			
NEED 2 TYPE:			
Symptoms: [Up to 20 words]			
Diagnosis/ assessment: <i>Refer to assessment tool/s completed and additional information collected as appropriate.</i> [Up to 120 words]			
Urgency/ Priority: <i>Is this issue the most important and urgent?</i> <i>Do any other issues identified create a conflict or ineligibility in terms of action to be taken?</i> [Up to 80 words]			
Plan/ Recommendation <i>Present 1-2 options</i> [Up to 100 words]			
Risk factors for delivery: <i>Identify 2 risks to this plan/ recommendation for consideration.</i> [Up to 30 words each]	1.		
	2.		
Supporting organisations: <i>Present 2 organisations that support the implementation of</i>	1.	Organisation:	
		Service offered: [Up to 30 words each]	
		Contact Number:	

<i>this plan/ recommendation.</i>		Weblink:	
	2.	Organisation:	
		Service offered: (Up to 30 words each)	
		Contact Number:	
		Weblink:	

GOALS

Outline the client's goals, both short-term and long-term, based on the identified needs and strengths.

GOAL TYPE		GOAL DESCRIPTION (Up to 30 words each)
3.	Short term goal	
4.	Short term goal	
3.	Long term goal	
4.	Long term goal	

CLIENT AGREEMENT AND SIGNATURES

I, _____ [Parent/ Guardian's Name], on behalf of _____ [Client's Full Name], acknowledge that I have reviewed and discussed the contents of this assessment report with the assessor. I understand the goals, interventions, and referrals outlined and agree to actively participate in the proposed support plan.

Client's name:	
Parent/ Guardian name	
Parent/ Guardian signature:	
Date signed:	
Assessor's Name:	
Assessor's Signature:	
Date:	

Note: This document outlines a service plan tailored to support the client's needs. It serves as a guideline to consider the co-existing needs of a client and the proposed support plan developed by the assessor.
