

CONDUCT CASE MANAGEMENT

UNIT CODE: COD/OS/SW/CR/11/6/A

UNIT DESCRIPTION

This unit describes the competencies required to conduct case management. It involves initiating case management process, creating client confidence, identifying client's problems/needs, developing case management plan, mobilizing case management resources and executing case management plan. It also entails conducting case management follow up and monitoring, evaluating case management outcomes, preparing case management report, disengaging case management process and finalizing or referring case management.

ELEMENTS AND PERFORMANCE CRITERIA

ELEMENT These describe the key outcomes which make up workplace function.	PERFORMANCE CRITERIA These are assessable statements which specify the required level of performance for each of the elements. <i>Bold and italicized terms are elaborated in the Range.</i>
1. Initiate case management process	1.1 Cases are categorized a per SOPs 1.2 Casework for each category is formulated as per legal implications 1.3 Case management for each category is developed as per organization policy 1.4 Public awareness is carried out as per organization policy
2. Create client confidentiality.	2.1 <i>Intake session</i> is conducted as per SOPs 2.2 The intake report is prepared as per organization policy
3. Identify Clients Problems/Needs	3.1 Relevant assessment tools are developed as per SOPs 3.2 Assessment is conducted and analyzed as per organization policy 3.3 Report is prepared as per organization policy

<p>4. Develop Case Management Plan</p>	<p>4.1 Client's needs are identified as per organization policy 4.2 Intervention measures are formulated as per SOPs 4.3 Clients roles are identified based on the intervention measures 4.4 Resource required are identified based on the case 4.5 Timelines is established based on intervention measures</p>
<p>5. Mobilize Case Management Resources</p>	<p>5.1 Mapping relevant stakeholders is conducted as per organization policy 5.2 Resources among stakeholders are identified as per organization policy 5.3 Stakeholder's directory is created as per organization policy 5.4 Planning and review meetings are conducted as per organization policy</p>
<p>6. Execute Case Management Plan</p>	<p>6.1 Case management planning meeting is conducted as per organisation policy 6.2 Case management resources are allocated as per organisation policy 6.3 Case management plan is implemented based on the resources allocated</p>
<p>7. Conduct Case Management follow up and monitoring</p>	<p>7.1 Case management review plan progress is monitored as per organisation policy 7.2 Case management review meetings are conducted as per organisation policy 7.3 Progress reports are prepared as per organisation policy 7.4 Recommendations are implemented as per SOPs</p>

8. Evaluate case management outcomes	<p>8.1 Case management evaluation plan is developed as per organisation policy</p> <p>8.2 Case management evaluation tools are developed as per organisation policy</p> <p>8.3 Administration of case management evaluation tools is done as per organisation policy</p> <p>8.4 Case management analysis of information gathered is carried out as per organisation policy</p> <p>8.5 Case management evaluation report is prepared as per organisation policy</p>
9. Prepare case management report	<p>9.1 Relevant information is gathered as per organisation policy</p> <p>9.2 Financial report is prepared based on the gathered information</p> <p>9.3 Final case management report is compiled as per organisation policy</p> <p>9.4 Final reports are shared depending on the cases under management</p>
10. Disengage case management process	<p>10.1 The exit strategy is formulated based on each case</p> <p>10.2 The exit strategy is implemented as per organisation policy</p> <p>10.3 Review of the exit strategy is carried out as per organisation strategy</p> <p>10.4 Report is prepared as per organisation strategy</p>
11. Finalize or refer case management	<p>11.1 Termination session is conducted as per SOPs</p> <p>11.2 Individual plan is reviewed as per organisation policy</p> <p>11.3 Referral is recommended based on the case under management</p>

RANGE OF VARIABLES

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environments and situations that will affect performance.

VARIABLE	RANGE
1. Intake session may include but not limited to:	<ul style="list-style-type: none"> • Create a rapport • Request for client background information • Presenting problem • Explanation of the processes and procedures • Identify and manage expectation

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit of competency.

Required Skills

The individual needs to demonstrate the following skills:

- Presentation
- Interpersonal relation
- Boundary setting
- Facilitation
- Training
- Planning and prioritization
- Empathy
- Self-awareness
- Report writing
- Critical thinking
- Persuasion
- Team work
- People management
- Coordination
- Organizational
- Decision making
- Emotional intelligence

Required knowledge

The individual needs to demonstrate knowledge of:

- Social welfare policies
- Human behaviour and social environment
- Social work practices and interventions
- Social research
- Legal aspects in child welfare
- Human growth and development
- Child welfare programmes
- Nutrition and food supply
- Basic counselling and psychology

- Rehabilitation programs
- Statistics
- Economics
- Basic accounting
- Digital literacy

EVIDENCE GUIDE

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

<p>1. Critical aspects of competency</p>	<p>Assessment requires evidences that the candidate:</p> <ul style="list-style-type: none"> 1.1 Demonstrated ability to identify and categorise cases 1.2 Demonstrated ability to develop a case management plan 1.3 Demonstrated ability to conduct public awareness 1.4 Demonstrated ability to conduct intake session 1.5 Demonstrated ability to develop and administer assessment tools 1.6 Demonstrated ability to prepare reports 1.7 Demonstrated ability to develop intervention measures 1.8 Demonstrated ability to establish timelines and resources for case management 1.9 Demonstrated ability to map relevant stakeholders 1.10 Demonstrated ability to create stakeholder's directory 1.11 Demonstrated ability to plan and conduct meetings 1.12 Demonstrated ability to conduct case management follow up and review 1.13 Demonstrated ability to develop case management evaluation plan 1.14 Demonstrated ability to develop and administer case evaluation tools 1.15 Demonstrated ability to formulate, implement and review an exit strategy 1.16 Demonstrated ability to conduct a termination session 1.17 Demonstrated ability to conduct case management referrals
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2. Resource Implications	The following resources MUST be provided: 2.1 A functional office 2.2 Fully equipped simulated operations training office
3. Methods of Assessment	Competency may be assessed through: 3.1 Written tests 3.2 Interview 3.3 Oral questioning 3.4 Observation 3.5 Third party report
4. Context of Assessment	Competency may be assessed: 4.1 On-the-job 4.2 Off-the –job 4.3 During Industrial attachment
5. Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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