

# Case Management

A collaborative process that assesses, plans, implements, coordinates, monitors and evaluates the options and services required to meet the client's health and human services needs

A Case Manager facilitates client wellness and autonomy, links clients with appropriate providers and resources, and achieves optimum value and desirable outcomes for all

## Principles



### PERSON-CENTRED SERVICES

Client and family members (where appropriate) are engaged in all aspects of case management, and services are tailored to client's needs, preferences and goals



### STRENGTHS PERSPECTIVE

Client strengths can be found within the person or the environment. Worker elicits, supports and builds on the resilience and potential for growth and development



### PRIMACY OF WORKER-CLIENT RELATIONSHIP

Therapeutic relationship between worker and client is essential in helping the client achieve his goals



### COLLABORATIVE FRAMEWORK

Worker works in collaboration with other workers, disciplines and organisations to advance the client's goals



### PERSON-IN-ENVIRONMENT FRAMEWORK

Worker understands that the client is in a mutually influential relationship with his physical and social environment



### MICRO, MEZZO, MACRO LEVEL INTERVENTIONS

Worker creatively uses a variety of approaches to effect change in individuals, families, communities, organizations, systems and policies

## Steps

**Assess**  
Collect in-depth information about a client's situation and functioning to identify needs in order to develop a comprehensive case management plan

1

**Plan**  
With clients, determine and document specific action-oriented and time specific objectives, goals and actions to meet needs

2

**Coordinate**  
Organise, obtain, integrate, modify and document resources needed to accomplish case goals

3

**Monitor & Evaluate**  
Document and evaluate case plan's effectiveness in reaching desired outcomes and goals, and modify or change plans where necessary

4

## Guidelines

- ✓ **Plan Ahead**  
Plan before there is a crisis and alleviate crisis-provoking situations
- ✓ **Be accountable**  
Do what you say you will do. Do it promptly. And carefully document what you have done
- ✓ **Be optimistic**  
Expect improvement. Reinforce success. Never miss an opportunity to give positive feedback. Set up situations in which your client is likely to succeed rather than situations that are complex and tricky
- ✓ **Involve your client**  
Let your clients decide what issues and problems in their lives take priority. Get their opinion and feedback about services and about their plans
- ✓ **Go where your clients are**  
Do not stay in your office. Go out and see where your clients are interacting with others
- ✓ **Promote independence**  
Model independence, encourage independence, teach skills to maintain independence
- ✓ **Develop a large number of resources**  
Know what agencies exist in the community. Develop good support systems you can rely on