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## **Central Coast Case Management Services**

### **Position Description:**

**Case Manager, Central Coast Case Management Services**

### **PRIMARY OBJECTIVE**

- To implement Central Coast Case Management Services in order to provide case management to program clients and their carers to assist in enabling clients to remain in their own homes and live a lifestyle of their own choice.

### **Philosophy**

Central Coast Case Management Services believes in:

- The rights of people to make choices in their own lives.
- The rights of people to dignity, respect, privacy and confidentiality.
- The right of people to be valued as individuals.
- The right of people to access services on a non-discriminatory basis and culturally appropriate.
- The right of the community to accountable and responsive services.

### **Outcomes**

The outcomes pursued by Central Coast Case Management Services are:

- that clients and their carers receive high quality case management support;
- that persons who are frail aged and younger people with disabilities can remain in their own home;
- that family or other primary care givers are supported in their role;
- that persons post public hospital discharge are supported for a set period of time with the aim of facilitating access to mainstream community services;
- that the agency operates in an effective, efficient and accountable manner.

### **Project Goals**

- to operate within the Project Guidelines to provide the best possible service to the Central Coast Case Management Services client/carers;
- to provide information to service providers, the community and medical practitioners relating to Central Coast Case Management Services;
- to outreach in the Gosford City Local Government Area to the community and to minority groups requiring service which are unable to access existing services;



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- to maintain effective and efficient service through constant revision of information, training methods and communication.

The work environment is busy, responsive to customer demands and requires regular adjustment of priorities and activities.

## **THE POSITION**

The Case Manager is responsible to the Project Manager of Central Coast Case Management Services.

The Case Manager is responsible for planning, coordination and assessment of home support services for the client target group for both Community Options and COMPACK programmes of Gosford City LGA. Resourcing and/or negotiation of service provision from a range of agencies is required and brokerage funds may be used if necessary.

The Case Manager requires an expert knowledge of issues relating to aged care, younger people with a disability, post hospital discharge care as per COMPACK guidelines and their carers.

## **KEY PERFORMANCE INDICATORS**

### **Area 1 – Case Management**

**Community Options and COMPACK case management are collaborative models of individual client focused service delivery that includes comprehensive assessment, planning, implementing and monitoring a mix of culturally appropriate services to support identified individuals to maintain or regain independence in the community with cost effective client focused outcomes**

The Case Manager is responsible for the implementation under relevant policies, procedures and guidelines of programs/services for the target groups identified. The Case Manager is required to assess and develop care plans; determine appropriate services and subsequent monitoring and evaluation; conduct case conferences and ensure accountability; and quality assurance of brokerage services for target groups within the **Standards of Practice and Performance as described by the Case Management Society of Australia.**



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## Principles of Case Management

- **The case manager client relationship:** developing a relationship is the foundation on which the case management process is based.
- **Continuity of care:** means that clients have a right to expect continuity of service across time and service boundaries in order to meet individual needs based upon eligibility and prioritisation based on programme guidelines.
- **The focus:** of this process is needs based care meeting individual goals.
- **A single point accountability:** a familiar person who has responsibility to explore then arrange and maintain a cohesive mix of services and support.
- **Flexibility.**
- **Titration support and structure:** Increasing and decreasing care to meet the changing needs of the individual.
- **Comprehensive Assessment covers:** a holistic manner encompassing all physical, social, cultural, spiritual and practical aspects of a person.
- **A cost effective and efficient utilisation of resources.**
- **Timely service delivery as needed and accepted by client.**
- **Access and integration of formal and informal supports.**
- **Confidentiality:** will be maintained at all times in accordance with legislative requirements and HACC standards.
- **Facilitating client independence:** the ultimate concern of the case manager is to enable clients to achieve their optimal level of independence and wellbeing within their community.
- **To assist people to self direct care and make their informed choices and decisions where appropriate.**

## Task Definition

The Case Managers Task Flow is based on the Case Management Society of Australia Standards of Practice.

<b>CMSA Standards of Practice</b>	<p>Case management model</p>	<b>Performance Indicators</b>
<b>1. Case Identification &amp; Assessment</b>	<p>Case managers are expected to:</p> <ul style="list-style-type: none"> <li>Ensure that clients understand their rights and responsibilities, supported by evidence of clients consenting to be involved in the program providing case management.</li> <li>Gather information about clients while respecting their confidentiality and privacy with the aim of not duplicating assessments.</li> <li>Identify and prioritise the client's initial needs to inform more comprehensive assessment once initial screening is completed. A comprehensive assessment, reflecting the client's situation and program guidelines, is completed within a reasonable timeframe. The case manager and client focus on areas within a social model of health that may influence the client's health and well-being.</li> <li>Explain the case management process to clients and ensure the client understands the complaints / appeal processes that apply to programs.</li> <li>Understand the client's specific cultural needs so that appropriate services and support for client development occurs.</li> <li>Communicate the criteria for disengagement with client.</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrated proficiency</li> <li>Client provided with information package</li> <li>Body language and communication skills develop appropriate relationships with people on all levels</li> <li>Electronic documentation kept up to date</li> <li>Receive referrals from all sources</li> </ul> <p>As required</p> <ul style="list-style-type: none"> <li>Screening of incoming referrals using approved screening tools</li> <li>Process referral onto data base and allocate client ID number</li> <li>Client data entered into data base in a timely manner</li> <li>Regular monitoring of people on waiting list</li> <li>Referrals prioritized using approved tools</li> <li>Assist with client allocation process</li> <li>Electronic client files kept and up to date</li> <li>Acknowledge referral in writing to referrer</li> </ul>
<b>2. Needs Identification</b>	<p>Case managers are expected to:</p> <ul style="list-style-type: none"> <li>Document and communicate client-identified needs in a language that is understood by the client, once the assessment process has commenced.</li> <li>Identify and analyze risk factors that the client experiences / may experience. The case manager and client determine which needs have a greater impact upon the client's well-being.</li> <li>Communicate in language that is understood by the client those needs which fall within the aims and objectives of the program (including any third party restrictions).</li> <li>Estimate the level of case management support required to implement a client's care plan and communicate this to the case management organisation.</li> </ul>	<ul style="list-style-type: none"> <li>Care Plan minimum annually, scanned and saved in data base in a timely manner – presented appropriate to client understanding (hard copies disposed of in confidential manner)</li> <li>Electronic client files kept and up to date</li> <li>Use of approved assessment tools – copies kept electronically in database</li> <li>Use analytical and problem solving skills to identify needs</li> <li>Body language and communication skills develop appropriate relationships with people on all levels</li> </ul>



<p><b>3. Planning</b></p>	<p>The case manager is expected to:</p> <ul style="list-style-type: none"> <li>Respond to the client's own assessment of their needs.</li> <li>Provide clients with appropriate information at the time of need, supporting the client's ability to make informed decisions. This includes the communication of eligibility requirements for services / supports.</li> <li>Support and develop the client's ability to independently access alternative resources to meet care needs.</li> <li>Seek the consent of the client before referrals are completed.</li> <li>Conduct research, interview and otherwise gather information to establish the factual base upon which to formulate a plan.</li> <li>Understand the client's current situation, probable future situation and ensuing care needs.</li> <li>Evaluate any barriers that may restrict the client's ability to meet the expected goal and determine strategies to minimise the impact of barriers.</li> <li>Develop and implement a plan that is within the financial resources available to support the client.</li> <li>Network with appropriate professionals and organisations to maximise potential for achieving client goals and care.</li> <li>Provide the client with a clear understanding of the services and choices available so that the client is an informed participant in all stages of the case management process.</li> <li>Document client goals (including measurable criteria) to determine the effectiveness of the interventions provided.</li> </ul>	<ul style="list-style-type: none"> <li>Cases Manager encourages self determination – observation</li> <li>Client provided with information package - observed</li> <li>Client agreement signed annually</li> <li>Copies of medical reports and other information</li> <li>Care Plan minimum annually</li> <li>Use effective communication skills to liaise/negotiate with service providers, health care professionals verbally and electronically in a timely manner</li> <li>Good rapport with service providers, health professionals – feedback/observation</li> <li>Hard copy documents scanned and saved in TCM data base in a timely manner. Hard copies disposed of in an approved manner</li> </ul>
<p><b>4. Monitoring</b></p>	<p>The case manager is expected to:</p> <ul style="list-style-type: none"> <li>Maintain rapport and communication with the client so that important information regarding the delivery of services, products and resources affecting the achievement of goals can be disclosed.</li> <li>Maintain professional rapport with service providers so that the case management plan can be discussed objectively, problems identified and adjustments made as needed.</li> <li>Advocate for service system improvements by identifying and communicating gaps / poor services to program managers.</li> <li>Adjust services, supports and resources to best meet the needs of the client.</li> <li>Notify the case management organisation or funding body (where applicable) of the likely implications of variations from the expected care plan.</li> <li>Recognise and respect the client's right to self-determination within legal parameters.</li> </ul>	<ul style="list-style-type: none"> <li>Body language and communication skills develop appropriate relationships with people on all levels</li> <li>Electronic files are kept up to date – minimum monthly contact</li> <li>Communication with other service providers in a timely manner – services are provided as expected by client</li> <li>Use problem solving, advocacy, analytical</li> <li>Negotiation, mediation and conflict resolution skills</li> </ul>
<p><b>5. Evaluating</b></p>	<p>The case manager is expected to:</p> <ul style="list-style-type: none"> <li>Develop and document goal statements that include timelines for evaluation of outcomes. In addition the case manager must undertake periodic evaluations (as stipulated by the program) and at the request of clients.</li> </ul>	<ul style="list-style-type: none"> <li>Customise care plan template appropriate to client need</li> <li>Care Plan reviewed minimum – annually</li> <li>Ensure client budget is observed – reviewed during supervision</li> </ul>



	<ul style="list-style-type: none"> <li>• Ensure that timelines for evaluation are communicated in a manner that is understood by the client.</li> <li>• Respond to the client's evaluation of the progress achieved through the case management process as the central component of the evaluation process.</li> <li>• Evaluate with the client the quality / volume of ongoing support needed to meet client goals. This includes the identification / review of parameters for disengagement of clients (where applicable).</li> <li>• Demonstrate accountability for adjustments and financial outcomes to the client care plan.</li> <li>• Identify opportunities for the client to remain independent / develop independence within any aspects of the client's overall care.</li> <li>• Document and report quantifiable impacts experienced by the client as a result of the care plan being implemented.</li> </ul>	<ul style="list-style-type: none"> <li>• Electronic client files are up to date</li> <li>• Conduct reviews and assessment using approved methods/tools</li> <li>• Advocate on behalf of client's behalf if requested</li> <li>• Encourage client self determination</li> <li>• Analyse effectiveness of services</li> </ul>
<p><b>6. Outcomes</b></p>	<p>The case manager is expected to:</p> <ul style="list-style-type: none"> <li>• Indicate how outcomes have been achieved through the processes of assessment, planning, monitoring and evaluation.</li> <li>• Report the cost effectiveness of the client care plan against the amount of resources made available.</li> <li>• Indicate any service gaps and communicate these to persons / bodies / organisations that have the capacity to adjust service levels / potentially meet client needs.</li> <li>• Have adequate knowledge of the service delivery system to encourage client independence where ever possible.</li> <li>• Minimise client dependency by developing self-advocacy skills in clients.</li> <li>• Examine issues related to sustainability of care for the client's level of need.</li> <li>• Demonstrate actions to support improvement / maintenance of quality of life for clients.</li> </ul>	<ul style="list-style-type: none"> <li>• Client budget reviewed during supervision</li> <li>• Update client progress during supervision</li> <li>• Review outcomes against care plan</li> <li>• Document outcome and exit pathway on data base</li> <li>• Provides client with clear pathways to a range of service</li> <li>• Encourage client self determination</li> </ul>
<p><b>CMSA Standards of Performance</b></p>		<p>Performance Indicators</p>
<p><b>1. Quality of Practice</b></p>	<p>The case manager is expected to:</p> <ul style="list-style-type: none"> <li>• Work within established case management standards, professional standards and applicable legislation.</li> <li>• Examine client and aggregate data to reflect case manager performance.</li> <li>• Review and apply outcomes data for clients and programs as a means to continually improve practice.</li> <li>• Practice in an ethical manner noted by professional discipline or organisational defined ethical standards.</li> <li>• Work within guidelines for currently identified best practices.</li> </ul>	<ul style="list-style-type: none"> <li>• Attend supervision monthly to review case load and client goals; monthly budget; accomplishments; case manager concerns; OHS issues; self care – provide approved documentation</li> <li>• Maintain budget – reviewed during supervision</li> <li>• Annual review/appraisal</li> <li>• Exhibits teamwork skills</li> <li>• Practice within guidelines</li> <li>• Practice appropriate to CALD,</li> </ul>



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		<ul style="list-style-type: none"> <li>aboriginal and other culturally diverse group</li> <li>Body language and communication skills develop appropriate relationships with people on all levels</li> <li>Actively participate in annual project review, planning days and programme promotions</li> <li>Demonstrate flexible working hours</li> <li>Electronically submit time sheets, vehicle log sheets, leave forms by deadline</li> </ul> <p>As required</p> <ul style="list-style-type: none"> <li>Generate reports from database</li> <li>Submit reports to DADHC by due date</li> <li>Prepare daily back-up of data base</li> </ul>
<b>2. Education / Preparation / Certification Qualifications</b>	<p>The case manager is expected to:</p> <ul style="list-style-type: none"> <li>Access a person experienced in case management who is able to provide supervision.</li> <li>Practice within their skills base and identify areas where performance in the role of case manager could be improved, and strategies to achieve that improvement.</li> <li>Undertake at least minimum levels of continuing education and development in accordance with professional / agency guidelines.</li> <li>Develop skills and knowledge to meet specific client group needs (specialisation).</li> </ul> <p>Advanced case managers are able to:</p> <ul style="list-style-type: none"> <li>Investigate the effectiveness of case management through practice-based research.</li> <li>Demonstrate their ability to create change in service systems.</li> <li>Participate in public discussion and debate to raise the profile and understanding of case managers / case management.</li> <li>Comment on the quality of available research into the practice of case management in the area of their practice domain.</li> </ul>	<ul style="list-style-type: none"> <li>Participates in staff development activities</li> <li>Actively participates in Case Management/Team meetings</li> <li>Completes training as identified in annual review/appraisal</li> <li>Attends and actively participates in networking opportunities – disseminate s information to other staff in a timely and accurate manner</li> <li>Case Manager participates in continually learning</li> </ul>
<b>3. Collaboration</b>	<p>The case manager is expected to:</p> <ul style="list-style-type: none"> <li>Place the client's needs and desired outcomes as the primary driver for case management.</li> <li>Maintain client confidentiality when engaging stakeholders.</li> <li>Apply communication and leadership skills to ensure service providers / resource providers meet client needs.</li> <li>Demonstrate the ability to navigate the service delivery system to meet client needs.</li> </ul>	<ul style="list-style-type: none"> <li>Body language and communication skills develop appropriate relationships with people on all levels</li> <li>Negotiation with service providers to engage services for client in a timely manner</li> <li>Client's needs are met</li> <li>Documentation completed electronically and in a timely manner</li> </ul>
<b>4. Legal</b>	<p>The case manager is expected to:</p> <ul style="list-style-type: none"> <li>hold a valid license / certificate to practice where these qualifications are required for the role of the case manager.</li> <li>Practice within the legislation that applies to the profession where the case manager is employed on the basis that the professional skills and licensing are applied within their case management role.</li> <li>Act within the policies and procedures of the</li> </ul>	<ul style="list-style-type: none"> <li>Case Manager has minimum qualifications</li> <li>Case Manager participates in continually learning</li> <li>Respond with read receipt when they have read and understood updates to policy and procedures</li> <li>Sign induction schedule to indicate policy and procedures have been read</li> </ul>



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	<p>organization they are working for.</p> <ul style="list-style-type: none"> <li>Act within the legislation pertaining to privacy and the sharing of client information.</li> <li>Seek appropriate resources for the resolution of legal questions.</li> <li>Administer available resources within the regulations of the funding body.</li> <li>Provide services which are appropriate / meaningful to the specific community, within the guidelines of the case management program, published case management standards and within the scope of practice of individual case managers.</li> </ul>	<ul style="list-style-type: none"> <li>and understood</li> <li>Hold current drivers license</li> <li>Remain informed about relevant current legislation , workplace entitlements and conditions; and other relevant information</li> <li>Practice within guidelines</li> </ul>
<b>5. Ethical</b>	<p>The case manager is expected to:</p> <ul style="list-style-type: none"> <li>Engage clients and services with respect for the autonomy, dignity, privacy and rights of the individual.</li> <li>Act as a client advocate to provide information enabling the individual to make informed decisions.</li> <li>Respect the individual's right to privacy.</li> <li>Seek appropriate resources and consultation to assist with ethical decision-making.</li> </ul>	<ul style="list-style-type: none"> <li>Observe the practice of ethical standards in documentation and behavior towards client</li> <li>Encourage client self determination</li> </ul>
<b>6. Advocacy</b>	<p>The case manager is expected to:</p> <ul style="list-style-type: none"> <li>Establish effective working relationships with clients, providers and funders.</li> <li>Develop clients' decision-making abilities, independence, and foster personal growth.</li> <li>Empower clients and support them where appropriate to move toward self-care in any aspect of their care.</li> <li>Educate and assist clients to facilitate access to appropriate services, supports and resources.</li> <li>Promote the development / extension of resources where service gaps are identified.</li> </ul>	<ul style="list-style-type: none"> <li>Use of approved methods of documentation</li> <li>Observe/feedback Case Manager's Proficiency</li> <li>Review client progress against goals during supervision</li> <li>Provides client with clear pathways to a range of services</li> <li>Encourage client self determination</li> </ul>
<b>7. Resource Utilisation</b>	<p>The case manager is expected to:</p> <ul style="list-style-type: none"> <li>Respect client preferences and include the client in all decision-making processes for selection of services, supports and resources.</li> <li>Procure services within the available funds / guidelines established by funding bodies.</li> <li>Implement a care plan that is sustainable (efficient and effective) within available resources and timeframes.</li> <li>Advocate for the development of services where gaps exist.</li> <li>Use collaboration to generate innovative responses to meet client needs where immediate solutions are not available.</li> <li>Maintain a strong awareness of the available resources and services within the local community / area of expertise.</li> <li>Engage client or recognised legal authority to explain care plan costs including client contributions.</li> <li>Request client feedback on the quality and appropriateness of services used.</li> </ul>	<ul style="list-style-type: none"> <li>Provides colleagues with new/updated information during Team Meetings and/or electronically</li> <li>Attends and actively participates in networking opportunities – disseminate information to other staff in a timely and accurate manner</li> <li>Remain informed about relevant current legislation and issues</li> <li>Utilise resources and the internet for specific and relevant information</li> </ul>
<b>8. Research</b>	<p>The case manager is expected to:</p> <ul style="list-style-type: none"> <li>Use interventions which are appropriate for the client as substantiated by research.</li> <li>Critique the available research literature for application to case management.</li> </ul>	<ul style="list-style-type: none"> <li>Participates in continual learning and networking opportunities</li> <li>Disseminate relevant new information to other staff in a timely and accurate manner</li> </ul>



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	<ul style="list-style-type: none"> <li>participate in research activities that are appropriate to educational preparation of the case manager and to the case management environment; these activities may include :             <ul style="list-style-type: none"> <li>the design and / or utilisation of data collection tools specific to individual practices;</li> <li>identifying suitable issues that would advance or support the practice of case management;</li> <li>participating in data collection (specifically outcome data);</li> <li>sharing research data with others via organisational meetings / committees, publications in industry journals and conference presentations;</li> <li>conducting research independently or in collaboration with others;</li> </ul> </li> <li>Use appropriate research findings in the development of policies, procedures and guidelines for high-quality, cost-effective care.</li> </ul>	
<p><b>9. Occupational Health &amp; Safety</b></p>	<p>The care manager is expected to:</p> <ul style="list-style-type: none"> <li>Adhere to organizational policies and procedure</li> <li>Conduct home safety assessments to identify safety issues within client homes</li> </ul>	<ul style="list-style-type: none"> <li>Report OH&amp;S issues in a timely manner</li> <li>Client home safety assessment reports saved electronically in data base</li> <li>Client/case manager safety issues addressed</li> <li>Project vehicles maintained in accordance with policy</li> <li>Hold current drivers license (minimum C class)</li> </ul>

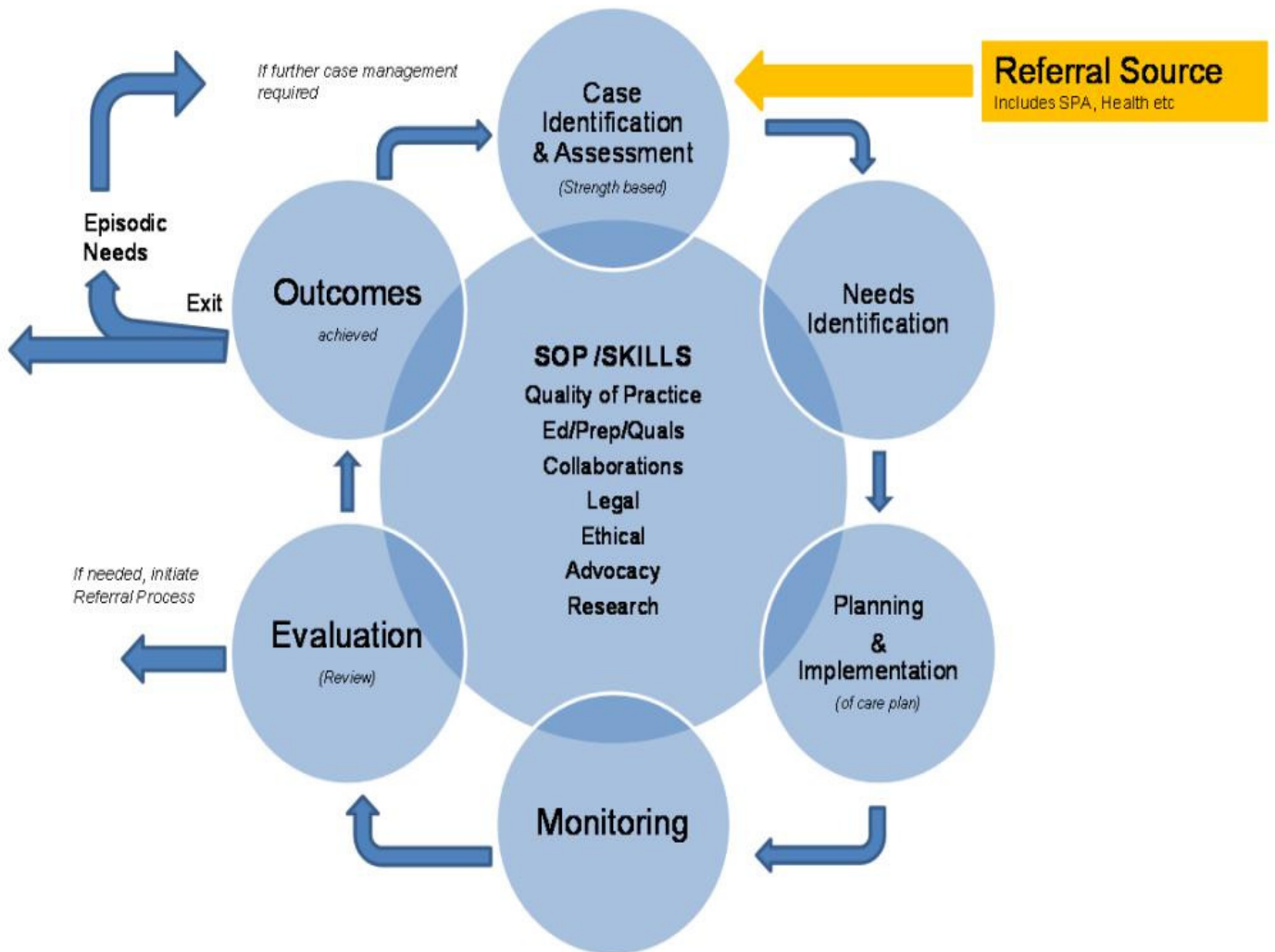
The Case Managers Task Flow is based on the Case Management Society of Australia Standards of Practice



Case management model

### Case Management Flowchart

(based on categories in the Case Management Society of Australia's Standards of Practice & Standards of Performance)





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## **KNOWLEDGE, SKILLS AND EXPERIENCE**

### **Selection Criteria**

**(to be addressed in full when making application)**

1. The following attitudes and personal qualities are sought in all employees
  - a. An open, helpful and respectful attitude toward the requirements of the position and the people with whom you work.
  - b. A willingness to make a positive difference every day.
  - c. An interest in using your initiative to solve problems and make improvements.
  - d. A readiness to learn and to adopt change throughout your working life.
  - e. Acceptance of personal responsibility for safe workplace behaviour.
  - f. Willingness to participate in approved professional development strategies to maintain and update the technical skills required by the role within the project and organisation.
  - g. Self Care skills or competencies

#### **Knowledge and Competence**

2. Professional tertiary qualifications in Social, Health or Behavioural Sciences and/or other relevant fields along with demonstrated experience working with the project's target population.
3. Demonstrated competence and experience in case management.
4. Demonstrated experience or knowledge in the application of legislation, policies, procedures and standards, including consideration of strategic implications impacting on the delivery of service to people within the target groups.
5. Demonstrated experience or knowledge in working with the delivery of culturally appropriate services for Aboriginal and culturally and linguistically diverse communities.
6. Highly developed written communication skills including demonstrated competence in the preparation of reports, correspondence and submissions.
7. Demonstrated high-level communication, interpersonal, negotiation and conflict resolution skills particularly when dealing with program client and carers. Ability to respond to and resolve complex and time sensitive issues
8. Demonstrated capacity to work effectively as a team member.



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9. Demonstrated competence in the use of a Information Technology .
10. Demonstrated experience or knowledge and understanding of the issues affecting access to services and support for frail older and people with a disability and their families and carers
11. Demonstrated experience or knowledge in managing priorities, resources and competing demands in an environment of change.
12. Demonstrated knowledge of the Gosford LGA Community Care sector.
13. Demonstrated knowledge of Home and Community Care Programs and Disability Support Standards.
14. Demonstrated knowledge of Occupational Health & Safety and Equal Employment Opportunities.
15. Current NSW Driver License

**Within the context of the position, the incumbent of also responsible for**

- Maintaining work standard quality.
- Continuous improvement of procedures and systems.
- Provision of quality client service.

**Location of Position**

The position will be required to work out of Central Coast Case Management Services Office.

**Probationary Period**

The position incumbent will undergo a 6 month probationary period. Successful completion of this probation will result in confirmation of the appointment.

**Working with Children Checks:**

The position is subject to the requirements of the Child and Young Persons Protection legislation and all applicants will be required to complete a Prohibited Employment declaration a time of their application.

**Health check:**

The successful applicant will be subject to a mandatory health check to fulfill OH&S obligations at a duly appointed Medical Centre.