



JUMBUNNA COMMUNITY PRESCHOOL AND EARLY INTERVENTION CENTRE INC.

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| St 3a | CASE MANAGEMENT |
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| Applies to: |
| Specific responsibility: |

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| Version: |
| Date approved: 5 Aug 2014 |

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| Policy context: This policy relates to | |
| Standards or other external requirements | NDIS Practice Standards |
| Legislation or other requirements | Disability Services Act |
| Contractual obligations | National Disability Insurance Agency |

POLICY STATEMENT

Jumbunna is committed to using a strengths-based family centred approach to case management to support clients to identify their individual needs and develop goals that will promote their independence and achieve optimal well-being and social participation.

The organisation will:

- clarify the role and responsibilities of clients, carers and case managers and the purpose of the case management process
- ensure that clients are involved in case meetings
- gather information to enable screening and comprehensive assessment
- assist and support active involvement and decision making by the client and relevant family members, carers or advocates
- provide information about formal and informal support options
- prepare an Individual Family Service Plan (IFSP) with the client
- coordinate, monitor, review and document the IFSP
- support clients to transition to other services or cease services as needed
- support and monitor staff caseloads to ensure staff are able to deliver effective case management services
- employ case management staff that have the necessary skills and experience to undertake the role and provide them with regular structured supervision and staff development

PROCEDURES

Clarifying Role and Responsibilities

- General Manager will ensure that clients are informed and understand:
 - the rights and responsibilities of the client and their families and/or carers.
 - the rights and responsibilities of the case management practitioners – including the role of the practitioners in facilitating access to informal and formal supports.
- Jumbunna's Complaints and Feedback Policy.

Screening and Assessment

An initial screening process will be undertaken by Staff to determine client eligibility for Jumbunna services.

Screening may also include a preliminary assessment to determine priority of assessment and/or a client's immediate primary needs (e.g., food, safety, shelter)

Prior to gathering any assessment information from a client, Jumbunna will get documented consent from the client for assessment and services. The consent of the client will be sought prior to exchanging any client information with other services that will be involved in providing services as part of the IFSP.

The assessment process will gather information on the social, emotional, educational, cultural and health needs of the client and develop goals in these areas to improve overall client well-being.

Formal and Informal Support Options

In determining the most appropriate support options with the client, Jumbunna will consider a range of factors, including cultural and language requirements, existing family, and carer support, whether the person is of Aboriginal or Torres Strait Island background, the person's mental health, the age of the client, current risks to client.

Case Planning, Records and Documentation

An individual client file will be prepared by staff for each client receiving case management services.

The file will contain documents as listed in the Confidentiality Policy.

The IFSP follows a standard format, and all plans should be completed on the IFSP Template.

The IFSP will include client goals, strategies/ steps for achieving goals, other agencies involved in service provision, schedule of services, formal and informal support strategies.

When the IFSP has been developed the plan will be jointly signed by the case manager and the client and General Manager and the original kept in the case file.

The client file will be updated and made available to the client for review, at a mutually convenient time.

The client will receive a copy of the IFSP once it has been developed, including any updates as they are made.

Coordination, Monitoring and Review

The case manager will liaise with all other service providers supporting the client to ensure that the client's needs are met through these services. Case managers will also maintain current information on service networks through participation in relevant local interagency groups.

The case manager will undertake regular monitoring of the client's progress against client goals and seek feedback from client and other services involved. The case manager may conduct case coordination meetings to gather information from all relevant sources.

IFSP's will be amended as required in discussion with the client and updated copies provided to client.

Clients receiving case management services will be reviewed as needed or at the request from the client.

Exit and Transition Planning

Exit and transition planning will be included as part of the IFSP, in particular where it relates to achievement of client goals. Prior to client exit a service exit review will be conducted to ensure all appropriate formal and informal supports are in place.

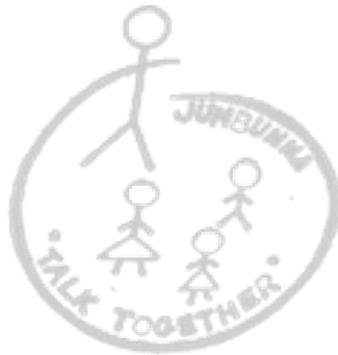
Staffing

Case managers will be provided with supervision during which case loads will be reviewed.

Case managers will be supported to continually develop their case management skills and professional networks.

Recruitment for case management positions will clearly identify the competencies required for case management.

Staff development will be provided to case managers to enable them to develop specialised skills and ensure their knowledge remains current.



DOCUMENTATION

| Documents related to this policy | |
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| Related policies | Confidentiality Policy, Complaints and Feedback Policy Transition and Exit, Client Assessment and Review, Client Rights and Service Charter, Client Decision Making and Choice, Client Safety and Security, Client Participation and Social Inclusion, Managing Challenging Behaviour |
| Forms, record keeping or other organisational documents | Initial Assessment letter to Client. |

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| Policy Name: | Case Management | Policy Number: | |
| Date Approved: | 24 August 2023 | Approved By: | Board of Management |
| Date Issued: | 31 August 2023 | Review Date: | 30 June 2025 |
| Version 1.5 | This version of the policy was approved 24 August 2023 and replaces the version approved 28 July 2022. | | |