

Q307

CASE MANAGEMENT POLICY

Policy Statement

Enhanced Lifestyles (EL) and Lifestyle Assistance and Accommodation Service (LAAS) is committed to using a strengths-based, person-centred approach to case management to support Customers/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 Customers/Clients, carers and case managers and the purpose of the case management process
- ensure that Customers/Clients are involved in case meetings
- gather information to enable screening and comprehensive assessment
- assist and support active involvement and decision making by the Customer/Client and relevant family members, carers or advocates
- provide information about formal and informal support options
- prepare a case management plan and provide accessible up-to-date information about the care/service arrangements
- coordinate, monitor, review and document the case plan
- support Customers/Clients to transition to other services or cease services as needed
- support and monitor employee caseloads to ensure employee are able to deliver effective case management services
- employ case management employees that have the necessary skills and experience to undertake the role and provide them with regular structured supervision and employee development

This document complies with NDIS 2018, standard 3.2 Support Planning, and ACIS 2013, section 3.5 Individual Service Plans.

This document is readily available to all Customers/Clients and employees of Enhanced Lifestyles and Lifestyle Assistance and Accommodation Service including The Boards.

Policy context: This policy relates to

Contractual obligations

Customer Service Agreements

Q307

CASE MANAGEMENT POLICY

Clarifying role and responsibilities

The Customer Relationship Officer (CRO) will ensure that Customers/Clients are informed and understand:

- the rights and responsibilities of the customer 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.
- Enhanced Lifestyles (EL) and Lifestyle Assistance and Accommodation Service (LAAS) grievance process.

Screening and Assessment

Enhanced Lifestyles and Lifestyle Assistance and Accommodation Service does not conduct an initial screening. It is sufficient screening where a customer has satisfied government requirements for funding or where they are self-funded and decide to use the organisation's services.

The consent of the customer or a guardian/ representative is obtained at the initial meeting with the CRO and with the establishment of the service agreement. The initial meeting will gather information on the social, emotional, educational, cultural and health needs of the customer and develop goals in these areas to improve overall customer well-being.

Formal and informal support options

In determining the most appropriate support options with the customer the CRO will comply the Customer Rights and Service Charter and will address the following issues wherever possible:

- 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 customer
- current risks to customer

Case planning, records and documentation

An individual customer file will be prepared by the Customer Relations Officer for each customer receiving case management services.

Q307

CASE MANAGEMENT POLICY

The file will contain the individual support plan, notes from customer meetings and all information that complements and supports the delivery of services. The individual support plan follows a standard format and all plans should be completed using the standard case plan template.

The case plan will include standard case plan inclusions e.g. customer goals, strategies/ steps for achieving goals, other agencies involved in service provision, schedule of services, formal and informal support strategies.

When the case plan has been developed the plan will be jointly signed by the CRO and the customer and a copy retained securely by the CRO. The customer file will be updated and made available to the customer for review at any time. The customer or their guardian/representative will also receive a copy of the individual support plan once it has been developed, including any updates as they are made.

Coordination, Monitoring and review

Where a brokerage arrangement is in place the CRO will liaise with all other service providers supporting the customer and draw up a memorandum of understanding and/or document service agreements to ensure that the customer's needs are met through these services. The CRO will also maintain current information on service networks through participation in relevant local interagency groups.

The Service Delivery team will undertake regular monitoring of the customer's progress against customer goals including an annual review where all relevant parties are consulted. Case plans will be amended as required in discussion with the customer and updated copies provided to customer upon request. Customers/Clients receiving case management services will also be reviewed following one or more of the following events: change in Customer/Client circumstance whether it be home relocation or the Customer/Client's health status, a request from the Customer/Client or a Lifestyle Attendant/Support Worker, or serviceable hour changes.

Exit and transition planning

Exit and transition planning will be included as part of the case plan, in particular where it relates to achievement of Customer/Client goals. Prior to Customer/Client exit a service exit review will be conducted by the Service Delivery team to ensure all appropriate formal and informal supports are in place.

Where applicable, Enhanced Lifestyles and Lifestyle Assistance and Accommodation Service will collaborate with other service providers or the service user to plan for the transition from the service so that their current and ongoing needs are met, and the

Q307

CASE MANAGEMENT POLICY

process is as seamless as practical.

See P301 Service Management Procedure.

Staffing

The Service Delivery team will be supported to continually develop their case management skills and professional networks.

Documentation

Documents related to this policy	
Related policies	Q102 - Customer Rights and Service Charter Q104 - Customer Safety and Security Q111 - Customer Participation and Social Inclusion Q112 - Customer Decision Making and Choice Q308 - Managing Challenging Behaviour P301 – Service Management Procedure
Forms, record keeping or other organisational documents	All relevant checklists used by the Service Delivery team