

Title	Plan and manage workflow and meet case management requirements		
Level	5	Credits	11

Purpose	<p>This unit standard is intended for people who work in case management roles in the public or private sectors.</p> <p>People credited with this unit standard are able to:</p> <ul style="list-style-type: none"> – plan and manage case management caseload; and – manage cases and meet case management requirements.
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Classification	Public Sector Services > Case Management
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Available grade	Achieved
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Guidance Information

- 1 Legislation and obligations relevant to this unit standard includes but are not limited to:
 - Health and Safety at Work Act 2015;
 - Human Rights Act 1993;
 - New Zealand Bill of Rights Act 1990;
 - Official Information Act 1982;
 - Privacy Act 2020;
 - Treaty of Waitangi/Te Tiriti o Waitangi;
 - Specific legislation applicable to a particular situation (e.g. Employment Relations Act 2000, Residential Tenancies Act 1986, Contract and Commercial Law Act 2017, Resource Management Act 1991); and all subsequent amendments and replacements.
- 2 Although this unit standard is classified in the *Case Management* domain within the *Public Sector Services* subfield, it is written so it can also be applied to non- public sector organisations as well as those within the public sector. Examples of such non- public sector organisations are insurance companies and third-party providers, health service providers, and rehabilitation service providers.
- 3 Demonstration of knowledge and skills must be consistent with any applicable code or codes of conduct such as the New Zealand State Services Code of Conduct, Standards of Integrity and Conduct (available from <http://www.ssc.govt.nz>) and/or any other organisation or sector specific code or codes of conduct and/or ethics, and must reflect operating professionally and ethically in New Zealand's diverse, bi-, and multicultural environment. All interactions with clients, their whānau, and peers/managers must reflect the values of the organisation and be consistent with the policies, procedures, and engagement models.

- 4 Performance must be demonstrated in the workplace or in practical simulation that fully replicates workplace conditions, materials, activities, responsibilities, and procedures.
- 5 Definitions
Case management is a collaborative process of assessment, planning, facilitation, and advocacy of options and services to meet an individual's holistic needs through communication and available resources to promote quality cost-effective outcomes.
Organisational requirements refer to instructions to staff on policies, procedures, and methodologies which are documented and are available in the workplace.

Outcomes and performance criteria

Outcome 1

Plan and manage case management caseload.

Performance criteria

- 1.1 Plan and manage caseload to reflect and progress business and case needs.
- 1.2 Prioritise and reprioritise caseload in response to business and case needs.

Outcome 2

Manage cases and meet case management requirements.

Performance criteria

- 2.1 Manage case files and records efficiently, using organisational systems including supplied tools, in accordance with organisational requirements.
- 2.2 Manage cases efficiently and accurately in terms of organisational requirements.
- 2.3 Use systems and tools in meeting planned case management requirements in a timely, proactive, and responsive manner, and in accordance with organisational requirements.

Range systems and tools used must include but are not limited to – customer relationship management, tasking, follow up.

Planned review date	31 December 2027
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Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	14 December 2017	31 December 2024
Review	2	27 October 2022	N/A

Consent and Moderation Requirements (CMR) reference

0121

This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

Comments on this unit standard

Please contact Ringa Hora Services Workforce Development Council qualifications@ringahora.nz if you wish to suggest changes to the content of this unit standard.