

Title	Determine and action solutions to complex case management issues		
Level	5	Credits	12

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"> – analyse complex case-related issues; and – develop and action an outcome-based solutions to the issues.
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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 **Range**
Evidence is required for a minimum of two complex case-related issues. Criteria for complex case-related issues may include but are not limited to any one or more of – multiple agency involvement; decision making requiring higher level approval; multiple inter-linked social issues such as welfare, education, and health; safety of persons involved; issues of a serious and/or sensitive nature; tension between client needs and organisational constraints.
- 6 **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. *Client*, for the purpose of this unit standard, refers to the end user of a service. *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

Analyse complex case-related issues.

Performance criteria

- 1.1 Identify elements of the case using organisational systems, tools, and resources as required.
- Range elements may include but are not limited to – nature of application/review, information and case documents, duration, multiple parties involved, client behaviour patterns and other risk factors, client expectations, financial factors, available expertise, available solutions, third party interests, risk to the organisation.
- 1.2 Evaluate and describe the identified elements in terms of relevance, validity, and potential impact.
- 1.3 Explain the case in terms of the issue to be resolved.

Outcome 2

Develop and action an outcome-based solution to the issues.

Performance criteria

2.1 Develop an outcome-based solution which addresses the needs of the client.

Range ensures safety for all parties; minimises risk and/or adverse publicity; is consistent with organisational policy, services, and resources; uses internal and/or external expertise as required; and aligns with the evidence of the case.

2.2 Implement an outcome-based solution which addresses the needs of the client and complies with organisational requirements.

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
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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.