

Title	Determine, communicate, apply, and record decisions in a case management context		
Level	5	Credits	22

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"> – make considered decisions in relation to client needs, entitlements and services; and – communicate, apply, and record case decisions.
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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.
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.
Stakeholders refers to external and internal stakeholders. External stakeholders may include but are not limited to – other agencies, professionals, judiciary, other service providers, networks, general public. Internal stakeholders are primarily the candidate and the staff and management of the candidate's organisation.

Outcomes and performance criteria

Outcome 1

Make considered decisions in relation to client needs, entitlements and services.

Performance criteria

- 1.1 Work with the client to identify their concerns, needs, and issues.
- Range concerns, needs, and issues may include but are not limited to – presenting, medium or long-term.
- 1.2 Ensure all relevant information is available in order to determine entitlement and services.
- Range information – client, policy, business requirements; may include advice.
- 1.3 Review criteria and provisionally determine client entitlement and services. Consider client factors, stakeholder interests, delegations and authorisations such as the power to apply discretion.
- Range client entitlement may include but is not limited to – benefit, payment, grant, access to services.
- 1.4 Modify if appropriate, and confirm the decision to ensure it correctly applies current law, policies, and procedures for the specific circumstances of the case.

Outcome 2

Communicate, apply, and record case decisions.

Performance criteria

- 2.1 Explain to the client and relevant stakeholders the thinking behind the decision making, including options considered and reasons for the decision, in accordance with organisational requirements.
- 2.2 Apply and record the decision in accordance 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.