

Title	Provide subject matter expertise in a case management context		
Level	6	Credits	12

Purpose	<p>This unit standard is intended for people who work in leadership 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"> – provide subject matter expertise to stakeholders regarding cases; and – provide advice to effect efficient management of cases.
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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
Health and Safety at Work Act 2015;
Human Rights Act 1993;
New Zealand Bill of Rights Act 1990;
Official Information Act 1982;
Privacy Act 1993;
Treaty of Waitangi/Te Tiriti o Waitangi;
Applicable contracts and agreements;
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.
- 4 Evidence for assessment must be based on workplace performance.

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.

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.

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

Provide subject matter expertise to stakeholders regarding cases.

Range internal stakeholders; may include external stakeholders.

Performance criteria

1.1 Provide subject matter expertise that is accurate, relevant, and current in terms of legislative and organisational requirements.

Range may include but is not limited to – financial claim assessment, risk assessment, rehabilitation assessment.

1.2 Provide subject matter expertise that is aligned with the organisation's scope of practice and its policies and procedures and demonstrates a broad awareness of stakeholder expectations.

1.3 Identify and articulate issues arising from cases that require changes to improve outcomes, and contribute to, evaluate, and advocate possible changes.

Range may include but is not limited to – policies and procedures, practice notes, claim guidelines.

Outcome 2

Provide advice to effect efficient management of cases.

Performance criteria

2.1 Provide advice on processes to ensure that cases are managed to organisation's standard for best outcome.

2.2 Provide appropriate feedback to ensure the efficient management of cases.

This unit standard is expiring. Assessment against the standard must take place by the last date for assessment set out below.

Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	1 March 2018	31 December 2024
Review	2	27 October 2022	31 December 2024

Consent and Moderation Requirements (CMR) reference

0121

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