Handout 2: Case Management Process

There are EIGHT key elements in a Case Management process. These are:

1. **Entry/screening** means making sure the service the client has been referred to, is appropriate to their needs and able to provide the requested service. Entry/screening should be processed quickly. If the client is found to be unsuitable for a service they should be fully informed of their rights and responsibilities.

2. **Assessment** is an ongoing process. There are two types of assessments: crisis and ongoing. Crisis assessment involves looking at a person's needs in terms of their immediate situation i.e. the need for safety, food shelter, health care, income and security. Ongoing assessment is more comprehensive and involves looking at all aspects of the person's life and incorporating their personal and external resources into planning the best way to meet their medium and longer term needs.

3. **Planning** is a process, which helps the client to identify their needs, clarify goals, determine priorities and identify the actions that are needed to achieve their goals. This part of the process is driven by the client and should address the needs as the client sees them.

4. **Direct service** means working directly with the client. It includes activities like counselling, finding information and services, and advocating on behalf of the client.

5. **Coordination of other services** usually involves calling a case conference. This gives the Case Manager an understanding of the role that other services have in helping a client to meet their needs and at the same time the Case Manager develops a working relationship with these other services.

6. **Monitoring and review** is a process of reassessing needs and revising the plan so that the case plan remains relevant to the changing needs and circumstances of the client.

7. **Case closure** and follow up means planning for the client to leave the service either to manage their lives independently or to work with another service.

8. **Evaluation** is a process of feedback between workers and clients, which aims to assess the effectiveness of the service that has been provided to the clients.