



Working agreement between		and	
Effective date		Client	

## AIM OF THE PROTOCOL

The protocol is an agreement to provide an understanding and direction for all parties participation in coordinated case management including an efficient and effective working relationship.

## SCOPE OF THE PROTOCOL

The protocol extends to include the following areas of effective a\case management in a working agreement:

- 1 Definition of coordinated case management
- 2 Principles of effective case management
- 3 Definition of a Key Case Manager
- 4 Role of Case Manager
- 5 Selecting Key Case Manager
- 6 Commitment to case management process and individual responsibilities
- 7 Definition of an action plan
- 8 Confidentiality Agreement
- 9 Grievance process
- 10 Communications
- 11 Case Meetings
- 12 Review
- 13 Commitment and sign off

### 1. DEFINITION OF COORDINATED CASE MANAGEMENT

Coordinated case management is an approach to service delivery, which enables clients with a range of complex needs to access services from a number of services providers in a coordinated and systematic fashion.

### 2. PRINCIPLES OF EFFECTIVE CASE MANAGEMENT & CLIENT EMPOWERMENT

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|-----|---|
| 2.1 | The aim of providing case management services is to empower the client to develop and put in place self management strategies |
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### 3. DEFINITION OF A KEY CASE MANAGER

The Key Case Manager coordinates the case management process, in consultation with the client, other involved carers and formal service providers. The Key Case Manager acts to provide an effective, organized, monitored and contracted services to a client, which is accountable in terms of cost and in terms of its ability to meet the client's needs.

### 4. ROLE OF KEY CASE MANGER

- |     |  |
|-----|--|
| 4.1 | coordinates the case management process, in consultation with the client, other involved carers and formal service providers   |
| 4.2 | acts to provide an effective, organised, monitored and contracted service to a client, which is accountable in terms of cost and in terms of its ability to meet the clients needs   |
| 4.3 | has overall responsibility for coordinating the communications, meetings, monitoring and review processes of case management.  |
| 4.4 | has licence in monitoring to hold accountable each party to this agreement and their intended commitments and actions as documented and agreed to in a action plan. This function is performed in partnership with the client. |
| 4.5 | will arrange for necessary meetings as determined within the action plan and may be required to facilitate such meetings.  |

### 5. SELECTING THE KEY CASE MANAGER

Selecting the key case manager can take into consideration a number of elements

- Holds statutory responsibilities for the young person
- Holds the funding for the young person
- Most contact/best rapport with the young person
- .
- .
- .
- .
- .

## 6. COMMITMENT TO CASE MANAGEMENT PROCESS AND INDIVIDUAL RESPONSIBILITIES

- 6.1 Signing of this case management protocol indicates an intention to commitment to all parts of the protocol including the role of the key case manager and individual/organizational responsibilities as listed in the Action Plan.

## 7. DEFINITION OF AN ACTION PLAN

An Action Plan is the written document that outlines the actions required for the case management process. It details roles and responsibilities of all involved parties, and timelines for achieving described goals. It accommodates the recording of review meetings and dates and findings as well as newly established goals and actions. It will also record details of termination dates or indicators. It can serve as a goal planning document with the client. The form can also serve as a contractual function with partnering services, and will therefore need to be read and signed by all involved parties

## 8. CONFIDENTIALITY AGREEMENT & INFORMED CONSENT

- 8.1 Parties to this agreement will adhere to a common understanding of Client Confidentiality

## 9. GRIEVANCE PROCESS

Each party to this agreement has the right to lodge a complaint about actions or processes which they believe have caused them concern or breached their individual rights.  
The Grievance Process is attached.

## 10. COMMUNICATIONS

Communication is an essential part of case management coordination and as such a common understanding about accepted and efficient communication is agreed to below.

- 10.1 All parties to this agreement commit to open and honest communication in attempting to assist clients to achieve identified goals.
- 10.2 All parties will utilize the case manager for indicating variations to agreed actions, attendance at meetings, agenda items for meetings, issues, problems and concerns with any aspect of case planning and action plan implementation.

## 11. CASE MEETINGS

- 11.1 Case meetings may be called by either the case manager or the client at anytime reasonable through out the delivery of case management.

## 12. REVIEW

- 12.1 Case reviews will be agreed to at the time of planning and may change according to the progress of client outcomes.
- 12.2 Case review meetings will be conducted

## 13. COMMITMENT AND SIGN OFF

All parties to this case management overview and full protocol agreement are committed to its scope and contents. We agree to follow an action plan process that respects the rights of each party and aims to assist the client to achieve their identified goals and expected outcomes.

Action plan attached and first review will be

Confidentiality/Personal information Agreement attached  Yes  No

	Name	Organisation	Signature:	Date
1.				
2.				
3.				
4.				
5.				
6.				