



Practice Guideline: Case management – gather and review information

This guideline provides information for staff about gathering and reviewing information in as part of case management, including in preparation for developing or reviewing a case plan.

Case management is a service delivery approach that is used across a range of settings in the human services and health sectors (see separate Practice Guideline: [Case management](#)). Gathering and reviewing information is a one of three (3) inter-dependent activities in case management.

Gather information

Staff are required to gather information from significant and relevant people during the assessment stage to inform the development or review of the child's case plan.

Where relevant and available, staff should obtain recent copies of:

- assessment and progress reports
- medical and dental records, including any mental health assessments
- school and education assessment reports, including Individual Learning Plans (ILP).

Identify strengths and protective factors that promote the goal

Use the results of all current assessments and any additional information gathered from significant and relevant people contributing to the case plan to help identify the child and family's strengths and protective factors. Significant people may include the child, where age and developmentally appropriate, their parents, siblings, extended family and carers. Relevant people may include:

- members of the Declared Care team
- other CPS teams, such as the Youth Support and Transition Team
- health professionals, specialists and current service providers
- the child's teacher or school counsellor
- representative from the Aboriginal or Torres Strait Islander community
- other community members or representatives.

Examples of the parent's strengths and protective factors that may assist in promoting the case plan goal (eg. attempting to address substance abuse by attending services, working cooperatively with CPS, or wanting to support the placement of their child in permanent care).

Examples of the child's strengths that may assist in promoting the case plan goal (eg. having a close relationship with a grandparent, being settled in a stable placement, wanting to return home, or working part time) (see separate Practice Guideline: [Protective factors - parental](#)).

Consider each domain of the case plan

There are eight (8) domains (see separate Practice Guideline: [Case planning - domains](#)). For each applicable domain in the child's case plan staff should record:

- information about the child or family that supports the child's wellbeing (eg. if the child is doing well at school, making friends and engaging in healthy and age appropriate activities, hobbies or interests)
- current needs for the child or family to be addressed (eg. the child is refusing to attend school, parents did not attend a parenting program as agreed, disagreements over contact, or the young person does not have the necessary independent living skills to successfully transition to adulthood)
- objectives that are specific, measurable, achievable, realistic and time limited (eg. a young person demonstrating adequate independent living skills prior to leaving care)
- tasks that need to be done to achieve the objectives (eg. assisting a young person leaving care to open a bank account and obtain their drivers licence)
- the person or agency responsible for completing tasks
- current progress in meeting case plan objectives.

Identify required service and support options

It is important to manage the expectations of children, parents and carers regarding what assistance can be provided. Where possible, discuss with the family the services and supports required to meet the assessed needs of the child, family or carer before a case conference.

Staff should consider services and supports that have been provided in the past and are currently being provided. In addition, staff should consider the family's or carer's willingness to accept support and work cooperatively with services. Staff should contact potential service providers to:

- ensure the child or family is eligible for the service
- confirm referral processes
- determine service availability, waiting times and costs.

Staff should consult with the Team Leader about alternative options where no services are available to meet an assessed need. The Team Leader can obtain in principle approval for any anticipated expenditure exceeding their delegation prior to the case conference.

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