CHCCCS004

Assess co-existing needs

Assessment 2 of 3

Case Study

Assessor Guide

Assessment Instructions

Task overview

This assessment task is divided into 3 parts.

- Part A: Prepare for assessment
- Part B: Assess client needs
- Part C: Assessment documentation process

Read each task carefully before capturing your response in the format indicated.

Additional resources and supporting documents

To complete this assessment, you will need to access the following:

- DZB Services – Company Profile
- DZB Services - Service Delivery Policy and Procedure
- DZB Services - Assessment Process – Client Information Sheet
- DZB Services – Client Forms and Templates
- DZB Services – Assessment Tools and Templates
- Client Intake Form – Kaveh Artin
- Informed Consent Form – Kaveh Artin
- Client Profile – Troy Murray
- Client Intake Form – Troy Murray
- Informed Consent Form – Troy Murray
- Moral Injury Questionnaire – Troy Murray
- Employability Skills – Troy Murray
- Additional Information – Troy Murray

These resources are located in the *Assessment 2* page on the *LMS*.

Assessment Information

Submission

You are entitled to three (3) attempts to complete this assessment satisfactorily. Incomplete assessments will not be marked and will count as one of your three attempts.

All questions must be responded to correctly to be assessed as satisfactory for this assessment.

Answers must be typed into the space provided and submitted electronically via the LMS. Hand-written assessments will not be accepted unless previously arranged with your assessor.

Reasonable adjustment

Students may request a reasonable adjustment for assessment tasks.

Reasonable adjustment usually involves varying:

- the processes for conducting the assessment (e.g. allowing additional time)
- the evidence gathering techniques (e.g. oral rather than written questioning, use of a scribe, modifications to equipment)

However, the evidence collected must allow the student to demonstrate all requirements of the unit.

Refer to the Student Handbook or contact your Trainer for further information.

Please consider the environment before printing this assessment.

IMPORTANT NOTE:

Review the following DZB Services collateral for this assessment:

- DZB Services – Company Profile
- DZB Services - Service Delivery Policy and Procedure
- DZB Services - Assessment Process – Client Information Sheet
- DZB Services – Client Forms and Templates
- DZB Services – Assessment Tools and Templates

All **DZB Services** documents references in this assessment are available on the *Assessment 2* page of the *LMS*.

Part A: Prepare for assessment

CASE STUDY:

You are a Case Worker at DZB Services, an organisation dedicated to bridging the gap between clients in need and community and mental health support services.

DZB Services aims to facilitate seamless connections between clients requiring assistance and a network of community services and mental health support providers. By acting as a bridge, we streamline the process, ensuring timely access to appropriate services.

A new client has been referred to you for wholistic community services and mental health support. You are required to prepare for a client assessment as appropriate.

Review the following information for Kaveh Artin for Part A:

☐ Client Intake Form

Task 1: Client assessment tools

Refer to the DZB Services - Assessment Tools and Templates and identify 2 assessment tools that you would use as part of your assessment process for this client.

Identify the issue and provide a short description of how the selected tool can help in the assessment process.

Assessor instructions: Students must identify 2 assessment tools that can be used to assess Kaveh Artin based on their Client Intake Form. The tools selected, associated issue and justification for this selection must be included in the students answer.

A sample answer is provided below. Students answers may vary, however they must be offered by DZB Services and be relevant to the issues identified in the client intake form including gender dysphoria, self-harm, depression, anxiety, homelessness and social isolation.

	ASSESSMENT TOOL (Up to 10 words each)	ISSUE and TOOL REASONING (Approximately 40 words each)
1.	Gender Dysphoria Assessment Questionnaire	This questionnaire assesses the emotional and psychological impact of gender dysphoria, focusing on distress, social functioning, and the impact on daily life. It helps understand Kav's experiences and emotional well-being related to gender dysphoria.

2.	Adolescent Self-Harm Assessment Tool	ASAT is used to assess self-harm tendencies in adolescents. Administering ASAT can provide insights into Kav's emotional state, helping mental health professionals tailor interventions to provide appropriate emotional support.

Task 2: Client assessment session information

Develop a *New Client Pack [section 1.3]* in line with the Assessment preparation process as set out in the DZB Services -Service Delivery Policy and Procedure document.

Include the following tools and templates in this *New Client Pack* folder:

1. DZB Services – Assessment Process - Client Information Sheet with frequently asked questions
2. Client Consent Form [per the DZB Services – Client Forms and Templates] to capture appropriate informed consent to treat and communicate with relevant sources about the client's needs and care.
3. 2 relevant assessment tool templates [per the DZB Services – Assessment Tools and Templates] for pre-completion or information gathering as appropriate.

Save this as a winzip folder and submit it with your assessment document and records. Use the following folder name conventions for this folder:

Folder name structure: CHCCCS004_02_A1b_<<Student ID>>_<<Student Name>>

Folder name example: CHCCCS004_02_A1b _11111111_Jane Smith

You must update the following elements of this folder name:

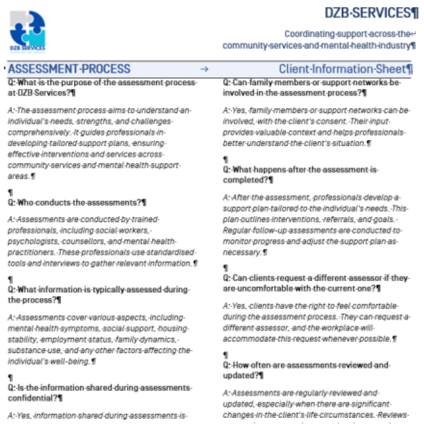
- <<Student ID>> = Your student ID as it is also captured on your assessment document footer.
- <<Student Name>> = Your name as it is also captured on your assessment document footer.

Assessor instructions: Students must collate the following collateral to provide to a new client:

1. Client Information Sheet [FAQs] [see snippet image below]
2. Client Consent Form [see snippet image below]
3. Assessment tool templates as identified in Part A Task 1a. Recommended forms per sample answer include Gender Dysphoria Assessment Questionnaire and Adolescent Self-Harm Assessment Tool.

All resources included must be the DZB Services resources provided to students. A sample of these documents is captured in the table below.

Client Information Sheet	Client Consent Form
MANDATORY	MANDATORY



DZB SERVICES

Coordinating support across the community services and mental health industry

ASSESSMENT PROCESS — Client Information Sheet

Q: What is the purpose of the assessment process at DZB Services?

A: The assessment process aims to understand an individual's needs, strengths, and challenges comprehensively. It guides professionals in developing tailored support plans, ensuring effective interventions and services across community services and mental health support areas.

Q: Who conducts the assessments?

A: Assessments are conducted by trained professionals, including social workers, psychologists, counsellors, and mental health practitioners. These professionals use standardised tools and interviews to gather relevant information.

Q: What information is typically assessed during the process?

A: Assessments cover various aspects, including mental health symptoms, social support, housing stability, employment status, family dynamics, substance use, and any other factors affecting the individual's well-being.

Q: Is the information shared during assessments confidential?

A: Yes, information shared during assessments is

Q: Can family members or support networks be involved in the assessment process?

A: Yes, family members or support networks can be involved, with the client's consent. Their input provides valuable context and helps professionals better understand the client's situation.

Q: What happens after the assessment is completed?

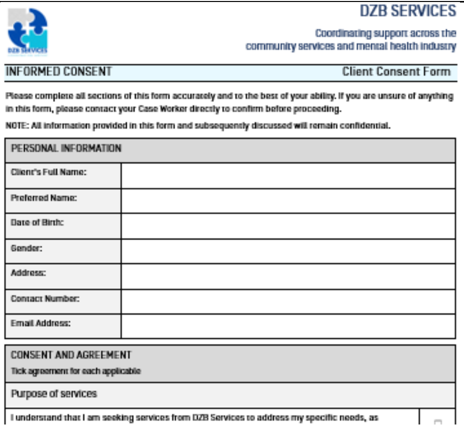
A: After the assessment, professionals develop a support plan tailored to the individual's needs. This plan outlines interventions, referrals, and goals. Regular follow-up assessments are conducted to monitor progress and adjust the support plan as necessary.

Q: Can clients request a different assessor if they are uncomfortable with the current one?

A: Yes, clients have the right to feel comfortable during the assessment process. They can request a different assessor, and the workplace will accommodate this request whenever possible.

Q: How often are assessments reviewed and updated?

A: Assessments are regularly reviewed and updated, especially when there are significant changes in the client's life circumstances. Reviews



DZB SERVICES

Coordinating support across the community services and mental health industry

INFORMED CONSENT — Client Consent Form

Please complete all sections of this form accurately and to the best of your ability. If you are unsure of anything in this form, please contact your Case Worker directly to confirm before proceeding.

NOTE: All information provided in this form and subsequently discussed will remain confidential.

PERSONAL INFORMATION	
Client's Full Name:	
Preferred Name:	
Date of Birth:	
Gender:	
Address:	
Contact Number:	
Email Address:	

CONSENT AND AGREEMENT Tick agreement for each applicable	
Purpose of services	
I understand that I am seeking services from DZB Services to address my specific needs, as	☐

Task 3: Coordinate client assessment session

Coordinate the client assessment session in consultation with the client by recording a simulated phone call with the client.

Task: During the call you must:

1. Introduce yourself, your role as Case Worker and the support offered through DZB Services.
2. Confirm receipt of their <u>Client Intake Form</u>.
3. Provide them with the opportunity to ask any questions they may have before this meeting.
4. Ask for details of times and dates that suits them for the client assessment session.
5. Schedule a time and date for the meeting.
6. Advise them you have a new client information pack (Part A Task 2) that you will email prior to the meeting, including a FAQ document, client consent form and 2 assessments tool templates.
7. Request they complete the following forms and return them via email to you prior to the meeting:
    a. Complete the Client Consent Form so that you can collect any additional information from resources as indicated in their intake form.
    b. Complete the 2 assessment tools identified in Part A Task 1.

Observable skills: You must demonstrate the following skills during the course of the phone call:

- Participate in a verbal exchange using clear language and appropriate tone.
- Ask questions and respond appropriately in order to set and confirm meeting details.
- Provide the client with information on the process and actions required.

Parameters: This call must not exceed 5 minutes and must involve 1 additional participant. Details on who to engage and the recording requirements are captured in the Role-Play Instructions.

KEY OBSERVATION CRITERIA
Students are required to engage in a short phone conversation between themselves as a Case Worker and a new client. During this call they must introduce themselves, confirm the details of the new clients up coming assessment, confirm session details, ask them to complete pre-assessment work and address any questions about the process they may have. Participants must address specific requirements as identified in the task in line with the **Role-Play Instructions** below.

ROLE-PLAY INSTRUCTIONS

In this task, you will participate in and record a role/play phone call with 1 other participant.
 	
The role-play must not exceed 5 minutes and must address all elements of the task instructions and Key Observation Criteria set out above.
 	
<u>Resourcing requirements:</u>
 	
In this task you will participate in a role-play phone call with another person. This may be resourced using one of the following options:
 	
1. A peer who you are already working with, within your qualifications industry.
 	
Peer participants will need to state their name and job title at the start of the recording to demonstrate their industry relevance as a participant and inform their consent.
 	
2. A fellow student. Please contact your fellow students via the Discussion Forum and coordinate your role play with them directly.
 	
Student participants will need to state their name and that they are a student (as their job title) at the start of the recording to inform consent.
 	
If you are unable to find someone to play the role of the other participant, contact your assessor via the Discussion Forum who will discuss options for pairing up with another student to complete this task.
 	
<u>Participant briefing:</u>
 	
You must fully brief all participants prior to the recording, providing them with the context to the role play/meeting, a role outline to play, a copy of the *Task* (including all relevant case study material), *Observable skills* and *Key Observation Criteria* above so that they can prepare for the recording.
 	
<u>Role Outline</u>
 	
• **Number of participants:** 1
• **Role**: Client Kaveh Artin in line with the Client Intake Form in Part A.
• **Gender**: The client Kaveh Artin may be performed by a male or female participant for role play purposes.
• **Contribution**: They must contribute as follows:
    o Review and understand the client persona as reflected in the <u>Client Intake Form</u> in the case study in Part A.
    o Suggest at least 2 options for the Client Assessment Session time and date and agree with mutually appropriate session booking details as presented.
 	
<u>Recording instructions</u>
 	
Your role play must be recorded with all participants voices recorded together.

Once you have logged into your course assessment page, there is the option to record directly into the online platform. Alternatively you may use a system such as Zoom, Skype or Teams to record the session and then load the file on completion. Consent to participate in the recording must be captured for all participants at the start of the meeting. This is achieved by the student reading the following statement at the start of the recording, with all participants replying their name and job title to inform consent. *"This session/presentation is being recorded for assessment purposes for my course with Swinburne Open Education. This session will be recorded and submitted through my course online learning platform to my Assessor for grading. All participants in this session indicate their consent to be included in this recording by stating their name and job title."* The time taken to capture consent at the start of the recording does not count towards the recording time limit. Include this recording as part of your assessment submission.

Assessor instructions: Students must conduct a simulated phone call to coordinate a client assessment session meeting with 1 participant playing the role of Kaveh Artin. This phone call must not exceed 5 minutes (excluding the participant consent).

Students must complete all elements of the Task, Observable skills and Key Observations Criteria identified above.

Assessors are to indicate result as Satisfactory (S) or Not Yet Satisfactory (NYS) in the Assessor Observation Checklist below.

ASSESSOR OBSERVATION CHECKLIST: Part A, Task 3 Students must demonstrate each of the performance criteria outlined in the observation checklist below.			
ACTIVITY	SATISFACTORY	NOT YET SATISFACTORY	ASSESSOR NOTE/COMMENTS Add comments as appropriate
Delivery checklist			
Recording completed with 1 participant in the role identified.	☐	☐	The student completed the session with 1 other participant, playing the role of a client per the case study.
Capture consent of all participants.	☐	☐	The student captured consent of all parties to the role play recording.
Recording completed within the timeframe allocated.	☐	☐	The student recorded the session within the timeframe allocated (excluding participant consent time).
Task checklist			
1. Introduce themselves, their role as Case Worker and the support offered through DZB Services.	☐	☐	The student introduced themselves, their role and the organisation.
2. Confirm receipt of their Client Intake Form.	☐	☐	The student confirmed they had received the completed client intake form.

3. Provide them with the opportunity to ask any questions they may have before this meeting.	☐	☐	The student offered the client opportunities to ask questions, and addressed questions raised, if any.
4. Ask for details of times and dates that suits them for the client assessment session.	☐	☐	The student asked for client input on appropriate assessment session dates and times.
5. Schedule a time and date for the meeting.	☐	☐	The student scheduled the appointment, confirming the time and date.
6. Advise them of the New Client information pack [Part A Task 2] that you will email prior to the meeting, including a FAQ document, client consent form and 2 assessments tool templates.	☐	☐	The student confirmed details of the New Client Information pack to be sent to them.
7. Request they complete the following forms and return them via email to you prior to the meeting:			The student asked the client to complete and return the identified forms ahead of the session.
a. Complete the Client Consent Form so that you can collect any additional information from resources as indicated in their intake form.	☐	☐	
b. Complete the 2 assessment tools identified in Part A Task 1.	☐	☐	
Skills checklist			
• Participate in a verbal exchange using clear language and appropriate tone.	☐	☐	The student participated in a professional interaction with a new client using appropriate language and tone.
• Ask questions and respond appropriately in order to set and confirm meeting details.	☐	☐	The student asked and responded to questions appropriately,
• Provide the client with information on the process and actions required.	☐	☐	The student provided the client with the appropriate information regarding the assessment process, appointment and pre-requisite tasks.

Task 4: Client information request

In your Client Intake Form, they identified 2 support services they had previously engaged.

Having received their completed Informed Consent Form, complete the *Gather existing information [section 1.5.2]* process set out in the DZB Services - Service Delivery Policy and Procedure to seek additional information on the client from the most relevant source provided.

Ensure your communication is professional and captures the information set out in the policy and procedure document.

Capture this communication in the email templates below.

[Approximate word count: 250 words in the body of the email]

Email Template	
To:	<<Add name(s) and position title of main email recipients here>>
From:	<<Name>>@dzbservices.org.au
CC:	<<Add names and position title of carbon copy email recipients here (leave blank if none)>>
Date/time:	<<Add the time and date of the email here>>
Subject:	<<Add the subject of the email here>>
Attachments:	<<Add the name of any attachments here (leave blank if none)>>
To <<Add email recipient(s) name here>>, <<Add message here. Add as much space as necessary.>> Kind regards,	
	<<Student name>> Case Worker 1 Woodstream Pl, Brookvale NSW 2100 Phone: 02 9988 7766 http://www.dzbservices.org.au

Assessor instructions: Students must draft an email communication requesting additional information about new client, Kaveh Artin, from Jo at The Gender Centre (as the relationship is ongoing).

This communication must be professional and capture the information set out in the relevant *Assessment Preparations* component of the policy and procedure document as set out below:

- Develop an email communication capturing the following information:
  - An introduction of themselves as Case Worker and the services they are offering through DZB Services.
  - Details of the new client, their relationship and any identified information requirements.
  - A request for any relevant information for consideration in the assessment process.
  - Confirmation of their consent in line with request (take a snippet from the completed Informed Consent form).
  - Include contact details for the client so that they may confirm consent as needed.

A sample answer is provided below. Students answers may vary however need to address the components outlined in the assessor instructions above.

Email Template	
To:	*jo@genderctr.org.au*
From:	*<<Studentname>>@dzbservices.org.au*

CC:	
Date/time:	*12/11/23 @ 12:05pm*
Subject:	*Client Information request*
Attachments:	*N/A*

To *Jo,*

I am ______________________ <<student name>> , a Case Worker at DZB Services.

DZB Services offer comprehensive coordination services, assessing the unique needs of clients and matching them with suitable community services and mental health support providers. Our team comprises of a range of professionals with expertise in social work, psychology, and community services.

DZB Services have been approached by Kevah Artin to provide and refer them to relevant support service.

In the client intake process they have indicated a previous relationship with you at the Gender Centre that may be relevant to their treatment or care plan going forward. As such, I would appreciate if you could send me through any information you may have on their history or plans regarding their:

- *gender dysphoria*
- *self-harm*
- *social interactions with family and friends*

This information gathering has been approved by Kevah Artin directly as reflected in their consent process below.

Release of Information	
I give my consent for DZB Services to communicate with other professionals, agencies, or individuals involved in my care, as deemed necessary for the continuation of services. This may include sharing relevant information with healthcare providers, social services, or educational institutions.	☒

CONSENT AND AGREEMENT Tick agreement for each applicable	
Client's name:	*Kaveh Artin*
Clients signature:	Kav
Date signed:	*12/11/23*

To confirm informed consent for this information sharing request, please feel free to contact Kaveh Artin on 0400 999 000. Alternatively if you have any questions, please call me on 9988 7766 to discuss this request further.

Alternatively, please send through any relevant information you have via email, marked "Private and Confidential". Please note: I understand the sensitive nature of this information and assure that it will be handled with utmost confidentiality and used solely for the intended purpose.

Kind regards,

Part B: Assess client needs

CASE STUDY:

You are a Case Worker at DZB Services, an organisation dedicated to bridging the gap between clients in need and community and mental health support services.

DZB Services aims to facilitate seamless connections between clients requiring assistance and a network of community services and mental health support providers. By acting as a bridge, we streamline the process, ensuring timely access to appropriate services.

A new client has been referred to you for wholistic community services and mental health support. You have been asked to complete a client assessment, determine appropriate support services and create a plan for them to engage these services as appropriate.

Review the following client information pack for Troy Murray for Part B:

☐ Client profile
☐ Client Intake Form
☐ Informed Consent Form
☐ Moral Injury Questionnaire
☐ Employability Skills assessment
☐ Additional information provided from additional sources

Task 1: Client assessment meeting

Conduct a client assessment meeting with Troy Murray in order to assess and support his needs.

Task: During the assessment session you must:

1. Introduce yourself, your role as Case Worker at DZB Services and the assessment process.
2. Confirm you will be recording the session through note taking and ask for the clients approval to do so.
3. Confirm the client may ask questions at any stage during the meeting.
4. Confirm receipt of the resources within the client information pack, and clarify any information needed to support assessment.
5. Apply a strengths-based approach to assessment incorporating skill, strength and success identification.
6. Empower the client to identify and prioritise their most urgent or worrying needs.
7. Capture client needs in relation to the location and accessibility of service delivery options.
8. Confirm your understanding of their needs based on what was included in the client information received as well as their thoughts and priorities raised in the session.

9. Confirm next step.

Observable skills: You must demonstrate the following skills during the course of the meeting:

- Conduct a professional meeting with a client so as to conduct a client assessment for support services with a focus on their presentation, language and tone.
- Guide and support the client through the process, allowing for client encouragement and empowerment.

Parameters: This meeting must not exceed 10 minutes and must involve 1 additional participant. Details on who to engage and the recording requirements are captured in the Role-Play Instructions.

KEY OBSERVATION CRITERIA
Students are required to engage in a short assessment session with a client. They are to apply a strengths-based approach to assessment, empower client issue identification and prioritisation and collect information needed to make recommendations to support the client. Participants must address specific requirements as identified in the task, observable skills and **Role-Play Instructions** below.

ROLE-PLAY INSTRUCTIONS
In this task, you will participate in and record a role-play meeting with 1 other participant. The role-play must not exceed 10 minutes and must address all elements of the Task, Observable skills and Key Observation Criteria set out above. **Resourcing requirements:** In this task you will participate in a role-play meeting with another person. This may be resourced using one of the following options: 1. A peer who you are already working with, within your qualifications industry. Peer participants will need to state their name and job title at the start of the recording to demonstrate their industry relevance as a participant and inform their consent. 2. A fellow student. Please contact your fellow students via the Discussion Forum and coordinate your role play with them directly. Student participants will need to state their name and that they are a student (as their job title) at the start of the recording to inform consent. If you are unable to find a participant to play the role of the other participant, contact your assessor via the Discussion Forum who will discuss options for pairing up with another student to complete this task. **Participant briefing:**

You must fully brief all participants prior to the recording, providing them with the context to the role play/meeting, a role outline to play, a copy of the *Task* (including all relevant case study material), *Observable skills* and *Key Observation Criteria* above so that they can prepare for the recording.

Role Outline

- **Number of participants:** 1
- **Role**: Client Troy Murray in line with the client information pack referred to in Part B.
- **Gender**: The client Troy Murray may be performed by a male or female participant for role play purposes.
- **Contribution**: They must contribute as follows:
    - Review and understand the client persona as reflected in the following documents:
        - Client profile
        - Client Intake Form
        - Client Consent Form
        - Moral Injury Questionnaire
        - Employability Skills assessment
        - Information provided from additional sources
    - Identify and present a prioritised version of their needs for support, eg. unemployment, alcohol and prescription medication misuse, mental health (moral injury), physical health (workplace injury) or social isolation support.
    - Identify a preferred location for support services and employment solutions to be based in line with local area and accessibility.

Recording instructions

Your role play must be recorded with all participants voices recorded on the one screen.

Once you have logged into your course assessment page, there is the option to record directly into the online platform. Alternatively you may use a system such as Zoom, Skype or Teams to record the session and then load the file on completion.

Consent to participate in the recording must be captured for all participants at the start of the meeting. This is achieved by the student reading the following statement at the start of the recording, with all participants replying their name and job title to inform consent.

"This session/presentation is being recorded for assessment purposes for my course with Swinburne Open Education. This session will be recorded and submitted through my course online learning platform to my Assessor for grading. All participants in this session indicate their consent to be included in this recording by stating their name and job title."

The time taken to capture consent at the start of the recording does not count towards the recording time limit.

Include this recording as part of your assessment submission.

Assessor instructions: Students must conduct a client assessment session with 1 participant playing the role of Troy Murray. This meeting must not exceed 10 minutes (excluding the participant consent).

Students must complete all elements of the Task, Observable skills and Key Observations Criteria identified above.

Assessors are to indicate result as Satisfactory (S) or Not Yet Satisfactory (NYS) in the Assessor Observation Checklist below.

ASSESSOR OBSERVATION CHECKLIST: Part B, Task 1 Students must demonstrate each of the performance criteria outlined in the observation checklist below.			
ACTIVITY	SATISFACTORY	NOT YET SATISFACTORY	ASSESSOR COMMENTS Add comments as appropriate
Delivery checklist			
Recording completed with 1 participant in the role identified.	☐	☐	The student completed the session with 1 other participant, playing the role of a client per the case study.
Capture consent of all participants.	☐	☐	The student captured consent of all parties to the role play recording.
Recording completed within the timeframe allocated.	☐	☐	The student recorded the session within the timeframe allocated (excluding participant consent time).
Task checklist			
1. Introduce themselves, their role as Case Worker at DZB Services and the assessment process.	☐	☐	The student must: • Introduce themselves, • outline their role as Case Worker at DZB Services • outline the assessment process.
2. Confirm you will be recording the session through note taking and ask for the clients approval to do so.	☐	☐	The student must confirm they will be taking notes and gain clients verbal consent to do so.
3. Confirm the client may ask questions at any stage during the meeting.	☐	☐	The student must confirm that the client is encouraged to ask questions throughout the assessment as needed.
4. Confirm receipt of the resources within the client information pack, and clarify any information needed to support assessment.	☐	☐	The student must confirm the resources they have received ahead of the session including: • Client profile • Client Intake Form • Client Consent Form • Moral Injury Questionnaire • Employability Skills assessment • Information provided from additional sources identified by the client in their intake form.
5. Apply a strengths-based approach to assessment incorporating skill, strength and success identification.	☐	☐	The student participated in a strengths-based assessment process incorporating the following: • Collaboratively engaging the client • Identifying client skills, talents and resources • Highlighting positive behaviours such as initiative, resilience and problem-solving. • Use of positive language.

			• Reference to assessment tool outcomes in line with priorities identified. The student may reference the clients skills, strengths and successes such as their extensive qualifications, recent skill upgrade to align with changing physical abilities etc.
6. Empower the client to identify and prioritise their most urgent or worrying needs.	☐	☐	The student must encourage the client to identify their top needs and most urgent concerns. The top 2 priorities could be: • unemployment (needs a job in line with physical ability) • metal health (moral injury) • physical health (addictions and pain management) • social isolation
7. Capture client needs in relation to the location and accessibility of service delivery options.	☐	☐	The student must confirm any location and accessibility restrictions the client would like considered in their plan.
8. Confirm your understanding of their needs based on what was included in the client information received as well as their thoughts and priorities raised in the session.	☐	☐	The student must confirm what they believe the client has identified as their top needs and most urgent concerns and relate this back to the information provided in the pack.
9. Confirm next step.	☐	☐	The student must outline the next steps in the process, for them to take this away, analyse the options and develop a plan for the client which they will present back shortly.
Skills checklist			
Conduct a professional meeting with a client so as to conduct a client assessment for support services with a focus on their presentation, language and tone.	☐	☐	Students must be well presented and use appropriate language and tone in their interaction with the client.
Guide and support the client through the process, allowing for client encouragement and empowerment.	☐	☐	The student guided their client through the process, encouraging them to participate in identifying and prioritising their concerns.

Task 2: Client Service Plan recommendations

Based on the information provided and the discussion during the client assessment session conducted in Part A Task 1, identify and analyse the clients complex co-existing needs.

Capture this assessment process in the Assessment Outcomes – Service Plan template found at Appendix A below.

Focus on the top 2 priorities identified by the client in the assessment session to determine immediate actions to engage support.

NOTE: The client is to be presented this plan in Part B Task 3. Use appropriate language and tone for this audience.

NOTE: In reviewing the client information pack, be sure to update details and assessment outcomes in the *Office Use Only* section of each form as appropriate. You will be required to create a client file management folder for submission in Part C Task 1 with this information included.

Assessor instructions: Students must complete the Assessment Outcomes – Service Plan template provided in Appendix A. Students must include the following in their answers:

1. Personal Information – directly copied from the Client Intake Form
2. Emergency Contact Information - directly copied from the Client Intake Form
3. Assessment Session Details - reflecting the initial assessment date as conducted.
4. Assessment Summary – A brief summary of the clients history based on the information provided in the profile, intake form and assessment tools, as well as the Assessment session conducted in Part B Task 1.
5. Strengths Description – An overview of 2 strengths/ positive elements to align the assessment to a strengths-based approach.
6. Co-existing Needs: A short introduction to the top 2 co-existing needs identified by the client in the Assessment session.
7. Symptoms, Diagnosis and Plan: A review of the first need identified capturing an analysis of the complex and interrelated nature of the issue, referencing the urgency of the problem and risks and suitability to potential solutions. Researching potential support service providers in line with client needs.
8. Symptoms, Diagnosis and Plan: A review of the first need identified capturing an analysis of the complex and interrelated nature of the issue, referencing the urgency of the problem and risks and suitability to potential solutions. Researching potential support service providers in line with client needs.
9. Goals - Reflect 2 short term and 2 long term goals in line with the clients identified priorities and the client information pack received.
10. Client Agreement and Signatures – This is blank for this Task as it is completed during the Assessment Outcome session recorded as Part B Task 3.

Students must capture their answer in the template found at Appendix A, however a sample answer is provided below. Students answers may vary however they must reflect the client profile, needs and priorities identified in the recorded assessment session captured in Part B Task 1 above.

DZB SERVICES

DZB SERVICES

Coordinating support across the community services and mental health industry

ASSESSMENT OUTCOMES — Service Plan

DZB Services representatives complete the following template in order to capture and report on client Assessment Outcomes and the Service Plan as agreed with the client.

NOTE: All information provided in this form and subsequently discussed will remain confidential.

1. PERSONAL INFORMATION	
Client's Full Name:	*Troy Murray*
Preferred Name:	*Troy*
Date of Birth:	*11 December 1974*
Gender:	*Male*

Address:	*1/12 Wyadra Ave, Curl Curl NSW*
Contact Number:	*0421 222 222*
Email Address:	*trymrry@gmail.com.au*

2. EMERGENCY CONTACT INFORMATION	
Name:	*Warwick Murray*
Relationship:	*Father*
Phone Number:	*0412 121 212*

3. ASSESSMENT SESSION DETAILS	
Initial assessment date:	*<<Date of assessment session recording>>*
Last assessment date:	*<<Blank or the same date as above.>>*

4. ASSESSMENT SUMMARY

Provide a concise summary of the client's current situation, highlighting key strengths, challenges, and co-existing needs identified during the assessment process.

(Approximately 120 words)

Troy has presented with the following concerns:

- *Unemployment*
- *Increased substance misuse*
- *Ongoing moral injury/ depression*

Troy suffered a workplace injury that has impacted his physical health and mobility resulting in his termination from his previous job. With ongoing decreased mobility likely, Troy has proactively undertaken additional skills training to qualify him for less manual/physical positions in his industry.

Troy has previously been challenged with substance abuse and as such has noted that he is becoming reliant on prescription medication (painkillers) to manage more than the pain they are prescribed for. As this is not what he wants, Troy has raised this as an area he would like support with.

5. STRENGTHS

Identify the client's strengths, skills, and positive attributes observed during the assessment.

STRENGTH TYPE		STRENGTH DESCRIPTION (Up to 70 words each)
1.	*Self-awareness*	*Troy is very aware of his history, what he has struggled with in the past and what he can and can't manage himself. This has lead to him asking for help now instead of waiting until he hits rock bottom which has meant that there are more options for*

		treatment and opportunities to reduce the overall negative impacts across Troys life.
2.	*Proactive behaviour*	*Troy has worked very hard in his career and following his injury he has proactively considered the impact his mobility limitations are likely to cause. Based on this Troy took the opportunity early on to enroll in training that will provide him with more skills to support a transition to a project management role so that his physical limitations are not a factor.*

6. CO-EXISTING NEEDS

List and describe the prioritised co-existing needs identified, such as mental health concerns, substance abuse issues, housing instability, employment challenges, etc.

NEED TYPE [Up to 5 words]		NEED DESCRIPTION [Approximately 20 words]
1.	*Employment*	*Currently unemployed. Need to source employment appropriate for Troys location, mobility, skills and experience.*
2.	*Substance use*	*Increased misuse of pain medication. Looking to address substance abuse and find alternatives to manage physical pain and mental health challenges.*

7. SYMPTOMS, DIAGNOSIS [if appropriate] AND PLAN

NEED 1 TYPE:	*Employment*
Symptoms: [Up to 20 words]	*Lost job due to physical injury, ongoing pain and mobility restrictions.*
Diagnosis/ assessment: *Refer to assessment tool/s completed and additional information collected as appropriate.* [Up to 120 words]	*In the Employability skills assessment, Troy identified himself as of average employability, however his experience and education place him much higher.* *Troy has over 10 years experience in the building and construction industry working his way from labourer to Site Supervisor.* *Troy previously completed an engineering degree and certification in building and construction. Troy has also recently completed diploma level training in construction project management.* *In addition to this, Troy's intake and assessment forms indicate he has a high attention to detail and strong written communication skills.* *Overall, Troy's experience and up to date training make him highly employable in a management position within the construction industry.*
Urgency/ Priority: *Is this issue the most important and urgent?* *Do any other issues identified create a conflict or ineligibility in terms*	*This issue was identified as the top priority for Troy in the Assessment session.* *He is in need of employment to support him financially, keep him occupied and provide a sense of purpose and growth.* *Seeking employment will need to be balanced with the other issue identified around the misuse of drugs and alcohol as there may be a need for inhouse treatment that would limit work.*

of action to be taken? [Up to 80 words]			
Plan/ Recommendation *Present 1-2 options* [Up to 100 words]	*Based on Troy's training and experience, I believe he is well placed to perform in a project management role within the building and construction industry.* *Troy could conduct a job search on roles at this level through seek.com.au or careerone.com.au. They have resources available online to support resume building and interview skills to support this process independently.* *Alternatively I would recommend Troy engage a specialist construction recruitment agency to help him secure an appropriate placement. They will have access to more positions within this industry and can also help with interview coaching.*		
Risk factors for delivery: *Identify 2 risks to this plan/ recommendation for consideration.* [Up to 30 words each]	1.	*Troy is also struggling with substance use issues that may inhibit him gaining or maintaining employment if not addressed simultaneously or in advance.*	
	2.	*Troy will need to secure employment with the understanding that he will need additional leave when he is scheduled for surgery.*	
Supporting organisations: *Present 2 organisations that support the implementation of this plan/ recommendation.*	1.	Organisation:	*Hays*
		Service offered: [Up to 30 words]	*Recruiting experts in qualified, professional and skilled work within the residential, commercial, industrial and civil disciplines.*
		Contact Number:	*02 9249 2260*
		Weblink:	*Hays*
	2.	Organisation:	*Frontline Recruitment*
		Service offered: [Up to 30 words]	*Recruitment support from careers advice, resume development, role sourcing, application processes, interview coaching etc.*
		Contact Number:	*02 8016 5400*
		Weblink:	*Frontline Recruitment*

8. SYMPTOMS, DIAGNOSIS (if appropriate) AND PLAN	
NEED 2 TYPE:	*Substance use*
Symptoms: [Up to 20 words]	*Increased dependence on alcohol and prescription medication to manage pain and underlying mental health issues around moral injury.*
Diagnosis/ assessment:	*Misuse of alcohol and other drugs.*

Refer to assessment tool/s completed and additional information collected as appropriate. [Up to 120 words]	*Based on his history and in his Moral Injury assessment Troy indicated he had achieved some control over his mental health issues following his deployment with the defense force, however his recent injury and unemployment have created conditions that have led him back to relying on alcohol and prescription medication to numb himself.* *Based on Troy's answers in his Moral Injury questionnaire, this is a significant contributor to this problem and it needs to be addressed before it becomes worse.* *Troys previous counsellor has not provided any additional history due to the timeline however his Physio indicated that he has a painful road ahead with a future surgery and ongoing physio to consider.*		
Urgency/ Priority: *Is this issue the most important and urgent?* *Do any other issues identified create a conflict or ineligibility in terms of action to be taken?* [Up to 80 words]	*This issue was identified as the second priority for Troy in the Assessment session.* *He wants to address his misuse of alcohol and other drugs as a numbing tool before it becomes a bigger issue to address, particularly as the pain in likely to continue indefinitely.* *Troys awareness of this issue and the desire to make a change indicates he may be able to manage this using outpatient rehabilitation or counselling treatments. While this would be harder, inhouse treatments would impact his employability in the immediate term.*		
Plan/ recommendation: *Present 1-2 options.* [Up to 100 words]	*Troy needs to consider rehabilitation to address this misuse of alcohol and other drugs.* *As Troy is managing an injury, it is recommended this be done at an in-patient drug and alcohol/counselling rehabilitation service as they can provide pain management alternatives in line with his needs.* *However, as Troy has been the one to raise his escalating alcohol and drug intake, it is possible that he could manage this as an outpatient. His awareness of the cause and impact of this is a strong indication of his motivation to address this in a more flexible format.*		
Risk factors for delivery: *Identify 2 risks to this plan/ recommendation for consideration.* [Up to 30 words each]	1.	*As Troy still requires further surgery, drug elimination is a significant challenge in terms of managing future pain – this will increase his chances for relapsing.*	
	2.	*Troy is relying on these substances to manage physical and emotional pain. The underlying emotional pain also needs to be addressed.* *Alternative answers may include:* • *If Troy undertakes inpatient care, he will not be in a position to commence new employment at this time.*	
Supporting organisations: *Present 2 organisations that support the implementation of this plan/ recommendation.*	1.	Organisation:	*St John of God – Inpatient care*
		Service offered: [Up to 30 words]	*We offer a range of mental health treatments from inpatient care, day programs, private psychiatry and/or community programs.*
		Contact Number:	*(02) 4570 6100*
		Weblink:	*Inpatient Care - SJOG*
	2.	Organisation:	*Alcohol & Drug Information Service*

		Service offered: [Up to 30 words]	*ADIS is a counselling helpline for those concerned with alcohol or drug misuse. ADIS is run by professional Counsellors who provide education, brief intervention counselling and referrals as appropriate.*
		Contact Number:	*1800 250 015*
		Weblink:	*[ADIS - St Vincents Hospital]*

9. GOALS		
Outline the client's goals, both short-term and long-term, based on the identified needs and strengths.		
GOAL TYPE		GOAL DESCRIPTION [Up to 30 words each]
1.	Short term	*Engage recruitment agency support to seek a project management position in line with recent qualification and physical limitations.*
2.	Short term	*Commence alcohol and other drug reduction program through St John of God. Register in day or outpatient program initially to align with achievement of other goals.*
1.	Long term	*Secure employment in a project management position in line with recent qualification and physical limitations.*
2.	Long term	*Minimise/ eliminate alcohol and drug use to manage emotional numbing. Seek ongoing counselling/ support to manage impact of underlying moral injury.*

10. CLIENT AGREEMENT AND SIGNATURES

[BLANK FOR NOW]

Note: This document outlines a service plan tailored to support the client's needs. It serves as a guideline to consider the co-existing needs of a client and the proposed support plan developed by the assessor.

Task 3: Client outcome meeting

Conduct a meeting with Troy Murray to discuss your assessment outcomes and Service Plan recommendations.

NOTE: You must print a copy of the completed Service Plan document developed in Part B Task 2 to bring to the meeting to present to the client, update in line with their decisions around recommendations and sign off once agreed in this meeting.

Task: During the outcome session you must:

1. Reintroduce yourself, your role and the assessment outcome process.
2. Confirm you will be recording the session through note taking and ask for the clients approval to do so.
3. Apply a strengths-based approach to the assessment and recommendation process focussed on the clients demonstrated skills, strengths and successes.

4. Present assessment outcomes and recommendations per the Service Plan based on client information collected and the assessment session conducted in Part B Task 1.
5. Encourage the client to raise any questions or needs they feel have not been addressed.
6. Seek decision-making from the client where multiple recommendations are made and agree outcomes.
7. Confirm implementation process including:
    a. Reflecting any adjustments on the Service Plan outcomes document (hand write annotations in the recorded session as appropriate).
    b. Agree responsibilities and encourage the client to advocate on their own behalf in accessing the service/s.
    c. Complete the *Client Agreement and Signatures (section 10)* of the Service Plan.
    d. Gain consent to provide relevant client information such as the Client Intake Form, Service Plan, assessment tools and/or additional information from other sources to support services to be engaged.
8. Outline the *Service handover and monitoring (section 3.3)* process set out in the DZB Services - Service Delivery Policy and Procedure document and schedule the first check in call.

Observable skills: You must demonstrate the following skills during the course of the meeting:

- Conduct a professional meeting with a client so as to present their assessment outcomes and recommendations with a focus on their presentation, language and tone
- Guide and support the client through the process, allowing for client decision-making and self-advocacy.

Parameters: This meeting must not exceed 10 minutes and must involve 1 additional participant. Details on who to engage and the recording requirements are captured in the Role-Play Instructions.

KEY OBSERVATION CRITERIA
Students are required to engage in a short assessment outcome session with a client. They are to apply a strengths-based approach to this process and empower the client to make decisions and self-advocate with services to be engaged. An agreement on the service plan must be reached and formalised with next steps laid out. Participants must address specific requirements as identified in the task, observable skills and **Role-Play Instructions** below.

ROLE-PLAY INSTRUCTIONS
In this task, you will participate in and record a role-play meeting with 1 other participant. The role-play must not exceed 10 minutes and must address all elements of the Task, Observable skills and Key Observation Criteria set out above. **Resourcing requirements:** In this task you will participate in a role-play meeting with another person. This may be resourced using one of the following options: 1. A peer who you are already working with, within your qualifications industry.

Peer participants will need to state their name and job title at the start of the recording to demonstrate their industry relevance as a participant and inform their consent.

2. A fellow student. Please contact your fellow students via the Discussion Forum and coordinate your role play with them directly.

   Student participants will need to state their name and that they are a student (as their job title) at the start of the recording to inform consent.

If you are unable to find a participant to play the role of the other participant, contact your assessor via the Discussion Forum who will discuss options for pairing up with another student to complete this task.

Participant briefing:

You must fully brief all participants prior to the recording, providing them with the context to the role play/meeting, a role outline to play, a copy of the *Task* (including all relevant case study material), *Observable skills* and *Key Observation Criteria* above so that they can prepare for the recording.

Role Outline

- **Number of participants:** 1
- **Role**: Client Troy Murray in line with the client information pack referred to in Part B.
- **Gender**: The client Troy Murray may be performed by a male or female participant for role play purposes.
- **Contribution**: They must contribute as follows:
  - Review and understand the client persona as reflected in the following documents:
    - Client profile
    - Client Intake Form
    - Client Consent Form
    - Moral Injury Questionnaire
    - Employability Skills assessment
    - Information provided from additional sources
  - Review and discuss the Service Plan as presented by the student.
  - Contribute to decision making in relation to recommendations made.
  - Resist but agree to self-advocacy with services to be engaged.
  - Confirm agreement with the service plan and sign off.

Recording instructions

Your role play must be recorded with all participants voices recorded on the one screen.

Once you have logged into your course assessment page, there is the option to record directly into the online platform. Alternatively you may use a system such as Zoom, Skype or Teams to record the session and then load the file on completion.

Consent to participate in the recording must be captured for all participants at the start of the meeting. This is achieved by the student reading the following statement at the start of the recording, with all participants replying their name and job title to inform consent.

"This session/presentation is being recorded for assessment purposes for my course with Swinburne Open Education. This session will be recorded and submitted through my course online learning platform to my Assessor for grading. All participants in this session indicate their consent to be included in this recording by stating their name and job title."

The time taken to capture consent at the start of the recording does not count towards the recording time limit.

Include this recording as part of your assessment submission.

Assessor instructions: Students must conduct a client assessment outcome session with 1 participant playing the role of Troy Murray. This meeting must not exceed 10 minutes (excluding the participant consent).

Students must complete all elements of the Task, Observable skills and Key Observations Criteria identified above.

Assessors are to indicate result as Satisfactory (S) or Not Yet Satisfactory (NYS) in the Assessor Observation Checklist below.

ASSESSOR OBSERVATION CHECKLIST: Part B, Task 3 Students must demonstrate each of the performance criteria outlined in the observation checklist below.			
ACTIVITY	SATISFACTORY	NOT YET SATISFACTORY	ASSESSOR COMMENTS Add comments as appropriate
Delivery checklist			
Recording completed with 1 participant in the role identified.	☐	☐	The student completed the session with 1 other participant, playing the role of a client per the case study.
Capture consent of all participants.	☐	☐	The student captured consent of all parties to the role play recording.
Recording completed within the timeframe allocated.	☐	☐	The student recorded the session within the timeframe allocated (excluding participant consent time).
Task checklist			
1. Reintroduce yourself, your role and the assessment outcome process.	☐	☐	The student must: • Reintroduce themselves, • outline their role as Case Worker at DZB Services • outline the assessment outcome process.
2. Confirm you will be recording the session through note taking and ask for the clients approval to do so.	☐	☐	The student must confirm they will be taking notes and gain clients verbal consent to do so.
3. Apply a strengths-based approach to the assessment and recommendation process focused on the clients demonstrated skills, strengths, and successes.	☐	☐	The student participated in a strengths-based assessment process incorporating the following: • Collaboratively engaging the client • Identifying client skills, talents and resources • Highlighting positive behaviours such as initiative, resilience and problem-solving. • Use of positive language.

			• Reference to assessment tool outcomes in line with priorities identified. The students recommendations must reference the clients skills, strengths and successes such as their extensive qualifications, recent skill upgrade to align with changing physical abilities etc.
4. Present assessment outcomes and recommendations based on client information collected and the assessment session conducted in Part B Task 1.	☐	☐	The student must present the recommendations made based on the clients issue identification and priorities and the information included in the client pack.
5. Encourage the client to raise any questions or needs they feel have not been addressed.	☐	☐	The student must encourage the client to ask any questions they may have as appropriate.
6. Seek decision-making from the client where multiple recommendations are made and agree outcomes.	☐	☐	The student must seek a decision on the recommendations from the client in line with their needs and preferences. An agreement must be reached.
7. Confirm implementation process including:			
a. Reflecting any adjustments on the Service Plan outcomes document (handwritten annotations in the recorded session as appropriate).	☐	☐	The student must capture notes on any changes or decisions made on the paper copy of the Service Plan in line with the clients agreement.
b. Agree responsibilities and encourage the client to advocate on their own behalf in accessing the service/s.	☐	☐	The student must discuss the clients responsibilities in engaging the services identified in order to promote self-advocacy.
c. Complete the Client Agreement and Signatures (section 10) of the Service Plan.	☐	☐	The student must capture the clients signature on the marked up copy of the Service Plan Client Agreement and signatured in line with their agreement. The student should also sign the document.
d. Gain consent to provide relevant client information such as the Service Plan, assessment tools and/or additional information from other sources to support services to be engaged.	☐	☐	The student must gain verbal consent from the client to send any relevant records to the services chosen for their reference.
8. Outline the Service handover and monitoring (3.4) process set out in the DZB Services Assessment and Service Delivery Policy and Procedure document and schedule the first check in call.	☐	☐	The student must outline the next steps in the process per the policy and procedure provided, including: • Schedule a phone check in with the client in 4 weeks. • Notify the client you the student will "Schedule a face to face or phone check in with the client in 12 weeks." • Notify the client you the student will "Circulate a Client satisfaction survey to capture the clients satisfaction with the services provided by DZB and their Case Worker, the Service Plan agreed and the support received from the referred services."
Skills checklist			

Conduct a professional meeting with a client so as to present their assessment outcomes and recommendations with a focus on their presentation, language and tone.	☐	☐	Students must be well presented and use appropriate language and tone in their interaction with the client.
Guide and support the client through the process, allowing for client decision-making and self-advocacy.	☐	☐	The student guided their client through the process, encouraging them to make decisions and advocate for themselves.

Task 4: Client outcome documentation

Scan and paste a copy of the *Client Agreement and Signatures* section of the Service Plan below as completed in the Assessment Outcomes session in Part B Task 3.

NOTE: You will need to save the scanned copy of the Service Plan in full to submit as part of Part C Task 1.

Assessor instructions: Students must paste a copy of the Client Agreement and Signatures section of the Service Plan below as completed in the Assessment Outcomes session complete with Client and Assessor details and signatures.

A sample answer is provided below however this must be an actual scan of a manually updated document.

<<Paste a screen shot of the Client Agreement and Signatured section of the Service Plan here.>>

CLIENT AGREEMENT AND SIGNATURES	
I, __Troy Murray___ [Client's Full Name], acknowledge that I have reviewed and discussed the contents of this assessment report with my assessor. I understand the goals, interventions, and referrals outlined and agree to actively participate in the proposed support plan.	
Client's Name:	Troy Murray
Client's Signature:	Troy Murray
Date:	<<Date>>
Assessor's Name:	<<Students name>>
Assessor's Signature:	<<Students signature>>
Date:	<<Date>>

Part C: Assessment documentation process

CASE STUDY:

You are a Case Worker at DZB Services, an organisation dedicated to bridging the gap between clients in need and community and mental health support services.

You have been working with a new client and have just completed the assessment and assessment outcome process. You have been asked to complete the documentation, referral and feedback process for this client in line with DZB Services Assessment and Service Delivery Policy and Procedure document.

Review the following client information pack for Troy Murray for Part C:

☐ Client Intake Form

☐ Informed Consent Form

☐ Moral Injury Questionnaire

☐ Employability Skills assessment

☐ Additional information provided from additional sources

☐ Service Plan as completed in Part B Task 2

Task 1: Client outcome documentation

Having completed the Assessment and Assessment Outcomes process with your new client, you now need to store and maintain their records in line with confidentiality requirements.

Create a client folder capturing the following documentation collected and maintained for Troy Murray in line with the *Documentation [section 4.1]* process set out in the DZB Services - Service Delivery Policy and Procedure:

1. Client Intake Form
2. Informed Consent Form
3. Moral Injury Questionnaire
4. Employability Skills assessment
5. Additional information provided from additional source 1 [reply with information]
6. Additional information provided from additional source 2 [reply only]
7. Approved and signed off Service Plan

Save this as a winzip folder and submit it with your assessment document and records. Use the folder and filename conventions, as well as folder password protections as provided in the policy document.

NOTE: You must ensure all documents are up to date, reflecting the outcomes of all assessments, meetings and outcomes completed in Part B. This includes completion of all details completed in consultation and relevant information in the *Office Use Only* sections of the following documents:

- Client Intake Form
- Moral Injury Questionnaire
- Employability Skills assessment
- Approved and signed off Service Plan

Assessor instructions: Students must create a password protected winzip folder with the following maintained files stored within it:

1. Client Intake Form – filename convention: Murray_Troy_Client Intake_<<date, yymmdd>>

2. Client Consent Form– filename convention: Murray_Troy_Client Consent_<<date, yymmdd>>
3. Moral Injury Questionnaire – filename convention: Murray_Troy_Moral Injury Questionnaire_<<date, yymmdd>>
4. Employability Skills assessment – filename convention: Murray_Troy_Employability Skills_<<date, yymmdd>>
5. Information provided from additional source 1 – filename convention: Murray_Troy_<<Source Name>>_<<date, yymmdd>>
6. Information provided from additional source 2 – filename convention: Murray_Troy_<<Source Name>>_<<date, yymmdd>>
7. Approved and signed off Service Plan – filename convention: <<Surname>>_<<First name>>_Service Plan_<<date, yymmdd>>

The password for the folder is "Murray222" as indicated on the Client Intake Form in line with the policy and procedure document.

Of the client documents, the following files must reflect the updates illustrated below.

Client Intake Form

-- OFFICE USE ONLY --		
Client ID:		Murray222
Assessment Date:		*<<Date Assessment Session conducted>>*
Assessed By:		*<<Assessment outcome as determined by the student.>>* *Example may include:*
Assessments Selected:	1.	*Moral Injury Questionnaire*
	2.	*Employability Skills*
Service Plan Agreed:		<<Date presented and agreed with client>> *<<Date Assessment Outcome Session conducted>>*
Referrals Made:	1.	*<<In line with recommendation as agreed in session>>*
	2.	*<<In line with recommendation as agreed in session>>*
Phone Check Up:		<<Date 4 weeks after Service Plan delivered to client>> *<<Date 4 weeks after Assessment Outcome Session conducted as agreed in Assessment Outcomes Session>>*
Face-to-face or Phone Check Up:		<<Date 12 weeks after Service Plan delivered to client>> *BLANK*
Client Satisfaction Survey:		<<Date 6 months after Service Plan delivered to client>>
	Date circulated:	*BLANK*
	Date returned:	*BLANK*
	Overall satisfaction rating: <<Survey Question 5>>	*BLANK*

Moral Injury Questionnaire

-- OFFICE USE ONLY --	
Assessment Date:	*<<Date Assessment Session conducted>>*
Assessed By:	*<<Student name>>*
Assessment Outcome: *<<Up to 150 words>>*	[Assessor can provide recommendations based on the assessment results, such as referral to outpatient or inpatient counselling services, specialist military counselling services and/or rehabilitation.] *<<Assessment outcome as determined by the student.>>* *Example may include:* *Based on Troy's answers in his Moral Injury questionnaire, this is a significant contributor to Troys substance misuse and it needs to be addressed before it becomes worse.* *Troy indicated he had achieved some control over his mental health issues following his deployment with the defense force, however his recent injury and unemployment have created conditions that have led him back to relying on alcohol and prescription medication to numb himself.* *Troys previous counsellor has not provided any additional history due to the timeline however his Physio indicated he is likely to have ongoing pain for the foreseeable future.* *Due to the complexity of this issue [Troy's ongoing physical pain] it is recommended that he attend inhouse rehabilitation. However this will impact Troys other co-existing need of getting a job, so he may way to consider attending as an outpatient or undergoing counselling to help with this recurring issue.*

Employability Skills assessment

-- OFFICE USE ONLY --	
Assessment Date:	*<<Date Assessment Session conducted>>*
Assessed By:	*<<Student name>>*

Overall assessment based on total:

|<---------- 10	---------- 11-20	-----|----- 21-30	---------- 31-40	---------->| 41-50
Poor employability skills	Below average employability skills	Average employability skills	Above average employability skills	Excellent employability skills

Assessment Outcome: *<<Up to 150 words>>*	[Assessor can provide recommendations based on the assessment results, such as referring to job searching tools and resources, recruitment agencies for job searching assistance, upskilling opportunities and/or engagement in unpaid/volunteer work.]

	<<Assessment outcome as determined by the student.>> *Example may include:* *Troy achieved an overall employability rating of 30 out of a possible 50, however his experience and education place him much higher.* *Troy has over 10 years experience in the building and construction industry working his way from Labourer to Site Supervisor.* *Troy has completed an engineering degree, a certification in building and construction and diploma level training in construction project management.* *Overall, Troy's experience and up to date training make him highly employable in a management position within the construction industry.* *It is recommended that Troy pursue a career in Project Management within Construction in line with his training and experience. He could pursue this independently or with the support of a Recruitment Service.*

Approved and signed off Service Plan

CLIENT AGREEMENT AND SIGNATURES	
I, __Troy Murray____ [Client's Full Name], acknowledge that I have reviewed and discussed the contents of this assessment report with my assessor. I understand the goals, interventions, and referrals outlined and agree to actively participate in the proposed support plan.	
Client's Name:	Troy Murray
Client's Signature:	Troy Murray
Date:	<<Date>>
Assessor's Name:	<<Students name>>
Assessor's Signature:	<<Students signature>>
Date:	<<Date>>

Task 2: Share client information

Based on the consent to share information gathered in the Informed Consent form and verbally confirmed in the Assessment Outcome session and in line with the Assessment Outcomes agreed with the client in Part B Task 3, provide relevant information to a service provider as identified.

Share this information using the 2 email templates below, in line with the *Information sharing [section 4.3]* process set out in the DZB Services - Service Delivery Policy and Procedure.

Ensure your communication is professional and includes the following:

- Email 1:
    - An introduction of yourself and your role as Case Worker at DZB Services.
    - A summary of the client, your assessment and the support being engaged.
    - A list of any resources being shared with them based on their upcoming meeting with the client.
        - Reference each attachment in the "Content" of the email and the "Attachments" section.
    - Confirmation that the password will be sent separately within 24 hours.

  [Approximate word count: 250 words in the body of email 1]

- Email 2:
    - Password details for the files previously sent.

  [Approximate word count: 10 words in the body of email 2]

Capture these communications in the email templates below.

<table>
<tr><th colspan="2">Email 1 Template</th></tr>
<tr><td>To:</td><td><<Add name(s) and position title of main email recipients here>></td></tr>
<tr><td>From:</td><td><<Name>>@dzbservices.org.au</td></tr>
<tr><td>CC:</td><td><<Add names and position title of carbon copy email recipients here (leave blank if none)>></td></tr>
<tr><td>Date/time:</td><td><<Add the time and date of the email here>></td></tr>
<tr><td>Subject:</td><td><<Add the subject of the email here>></td></tr>
<tr><td>Attachments:</td><td><<Add the name of any attachments here (leave blank if none)>></td></tr>
<tr><td colspan="2">To <<Add email recipient(s) name here>>,

<<Add message here. Add as much space as necessary.>>

Kind regards,</td></tr>
<tr><td colspan="2"><<Student name>>
Case Worker
1 Woodstream Pl, Brookvale NSW 2100
Phone: 02 9988 7766
http://www.dzbservices.org.au</td></tr>
</table>

<table>
<tr><th colspan="2">Email 2 Template</th></tr>
<tr><td>To:</td><td><<Add name(s) and position title of main email recipients here>></td></tr>
<tr><td>From:</td><td><<Name>>@dzbservices.org.au</td></tr>
<tr><td>CC:</td><td><<Add names and position title of carbon copy email recipients here (leave blank if none)>></td></tr>
<tr><td>Date/time:</td><td><<Add the time and date of the email here>></td></tr>
<tr><td>Subject:</td><td><<Add the subject of the email here>></td></tr>
</table>

Attachments:	<<Add the name of any attachments here (leave blank if none)>>
To <<Add email recipient(s) name here>>, <<Add message here. Add as much space as necessary.>> Kind regards,	
DZB SERVICES COORDINATING SUPPORT	<<Student name>> Case Worker 1 Woodstream Pl, Brookvale NSW 2100 Phone: 02 9988 7766 http://www.dzbservices.org.au

Assessor instructions: Students must create 2 emails to a service provider as agreed with the client in the Assessment Outcomes session. In line with the written consent provided initially and confirmed verbally in the Assessment Outcomes session, they must send through relevant client information relating to the care planned.

Student communication must be professional and include the following:

- Email 1:
  - An introduction of the student as the Case Worker at DZB Services.
  - A summary of the client, their assessment and the support being engaged.
  - A list of any resources being shared with them based on their upcoming meeting with the client.
    - Reference each attachment in the "Content" of the email and the "Attachments" section.
  - Confirmation that the password will be sent separately within 24 hours.
    (Approximate word count: 250 words in the body of email 1)
- Email 2:
  - Password details (Murray222) for the files previously sent.
    (Approximate word count: 10 words in the body of email 2)

Sample answers for each email are provided below. Students answers will vary based on the Service Plan and providers agreed with the client in the Assessment Outcomes session. All information shared must only include files that represent relevant information for the treatment the client is engaging the service provider for.

Email 1 Template	
To:	*<<Add name(s) and position title of main email recipients here>>*
From:	*<<StudentName>>@dzbservices.org.au*
CC:	
Date/time:	*12:00pm xx/xx/xx*
Subject:	*Troy Murray*
Attachments:	*<<TM_Client Intake Form>>, <<TM_Assessment Tool>>, <<TM_Additional information>>, <<TM_Service Plan>>*
To *<<Service Contact>>,* *I am ______________________ <<student name>> , a Case Worker at DZB Services.*	

DZB Services offer comprehensive coordination services, assessing the unique needs of clients and matching them with suitable community services and mental health support providers. Our team comprises of a range of professionals with expertise in social work, psychology, and community services.

We have recently completed an Assessment on a new client, Troy Murray. The outcome of this assessment is that Troy requires support with <<insert the type of support the client is pursuing with this service provider.>>

I believe Troy has contacted you in order to engage you for this purpose as part of our focus on self-advocacy.

To help you understand the process so far and some of the relevant background I have on Troy, please find attached the following documents:

- *Client Intake Form*
- *Relevant Assessment Tool (if appropriate)*
- *Information collected from additional sources (if appropriate)*
- *Agreed Service Plan*

These documents have been password protected to ensure Troy's privacy and confidentiality is maintained. A second email will be posted within 24 hours with the passwords without reference to the clients name.

Please reach out should you need any additional information or background on this client. I will check in a little later in the process to see how Troy is progressing and how well the processes worked for you.

Kind regards,

<<Student name>>
Case Worker
1 Woodstream Pl, Brookvale NSW 2100
Phone: 02 9988 7766
http://www.dzbservices.org.au

Email 2 Template

To:	*<<Add name(s) and position title of main email recipients here>>*
From:	*<<StudentName>>@dzbservices.org.au*
CC:	
Date/time:	*12:00pm xx/xx/xx (within 24 hours of email 1)*
Subject:	*Client Referral*
Attachments:	

To *<<Service Contact>>,*

"Murray222"

Kind regards,

<<Student name>>
Case Worker
1 Woodstream Pl, Brookvale NSW 2100
Phone: 02 9988 7766
http://www.dzbservices.org.au

Assessment checklist:

Students must have completed all tasks within this assessment before submitting. This includes:

Part A: Prepare for assessment		
1.	Client assessment tools – Table	☐
2.	Client assessment session information pack – Winzip folder with files	☐
3.	Coordinate client assessment session – Phone call role play recording	☐
4.	Client information request from additional sources – 1 x email	☐
Part B: Assess client needs		
1.	Client assessment meeting – Meeting role play recording	☐
2.	Client service plan and recommendations – Service Plan template (Appendix A)	☐
3.	Client assessment outcome meeting – Meeting role play recording	☐
4.	Client assessment outcome documentation – Screenshot of approval	☐
Part C: Assessment documentation process		
1	Client document outcome – Winzip folder with files	☐
2	Share client information – 2 x emails	☐

Congratulations you have reached the end of Assessment 2!

DZB SERVICES

Coordinating support across the community services and mental health industry

ASSESSMENT OUTCOMES — Service Plan

DZB Services representatives complete the following template in order to capture and report on client Assessment Outcomes and the Service Plan as agreed with the client.

NOTE: All information provided in this form and subsequently discussed will remain confidential.

PERSONAL INFORMATION	
Client's Full Name:	
Preferred Name:	
Date of Birth:	
Gender:	
Address:	
Contact Number:	
Email Address:	

EMERGENCY CONTACT INFORMATION	
Name:	
Relationship:	
Phone Number:	

ASSESSMENT SESSION DETAILS	
Initial assessment date:	
Last assessment date:	

ASSESSMENT SUMMARY
Provide a concise summary of the client's current situation, highlighting key strengths, challenges, and co-existing needs identified during the assessment process.

(Approximately 120 words)

STRENGTHS		
Identify the client's strengths, skills, and positive attributes observed during the assessment.		
STRENGTH TYPE		STRENGTH DESCRIPTION (Up to 70 words each)
1.		
2.		

CO-EXISTING NEEDS		
List and describe the prioritised co-existing needs identified, such as mental health concerns, substance abuse issues, housing instability, employment challenges, etc.		
NEED TYPE		NEED DESCRIPTION (Up to 20 words each)
1.		
2.		

NEED 1: SYMPTOMS, DIAGNOSIS (if appropriate) AND PLAN	
NEED 1 TYPE:	
Symptoms: (Up to 20 words)	
Diagnosis/ assessment: *Refer to assessment tool/s completed and additional information collected as appropriate.* (Up to 120 words)	
Urgency/ Priority:	

Is this issue the most important and urgent? *Do any other issues identified create a conflict or ineligibility in terms of action to be taken?* (Up to 80 words)			
Plan/ Recommendation *Present 1-2 options* (Up to 100 words)			
Risk factors for delivery: *Identify 2 risks to this plan/ recommendation for consideration.* (Up to 30 words each)	1.		
	2.		
Supporting organisations: *Present 2 organisations that support the implementation of this plan/ recommendation.*	1.	Organisation:	
		Service offered: (Up to 30 words each)	
		Contact Number:	
		Weblink:	
	2.	Organisation:	
		Service offered: (Up to 30 words each)	
		Contact Number:	
		Weblink:	

NEED 2: SYMPTOMS, DIAGNOSIS (if appropriate) AND PLAN	
NEED 2 TYPE:	
Symptoms:	

<table>
<tr><td colspan="3">[Up to 20 words]</td><td></td></tr>
<tr><td colspan="3">Diagnosis/ assessment:
Refer to assessment tool/s completed and additional information collected as appropriate.
[Up to 120 words]</td><td></td></tr>
<tr><td colspan="3">Urgency/ Priority:
Is this issue the most important and urgent?
Do any other issues identified create a conflict or ineligibility in terms of action to be taken?
[Up to 80 words]</td><td></td></tr>
<tr><td colspan="3">Plan/ Recommendation
Present 1-2 options
[Up to 100 words]</td><td></td></tr>
<tr><td rowspan="2">Risk factors for delivery:
Identify 2 risks to this plan/ recommendation for consideration.
[Up to 30 words each]</td><td>1.</td><td colspan="2"></td></tr>
<tr><td>2.</td><td colspan="2"></td></tr>
<tr><td rowspan="6">Supporting organisations:
Present 2 organisations that support the implementation of this plan/ recommendation.</td><td rowspan="4">1.</td><td>Organisation:</td><td></td></tr>
<tr><td>Service offered:
[Up to 30 words each]</td><td></td></tr>
<tr><td>Contact Number:</td><td></td></tr>
<tr><td>Weblink:</td><td></td></tr>
<tr><td rowspan="2">2.</td><td>Organisation:</td><td></td></tr>
<tr><td>Service offered:</td><td></td></tr>
</table>

		[Up to 30 words each]	
		Contact Number:	
		Weblink:	

GOALS		
Outline the client's goals, both short-term and long-term, based on the identified needs and strengths.		
GOAL TYPE		**GOAL DESCRIPTION** [Up to 30 words each]
1.	Short term goal	
2.	Short term goal	
1.	Long term goal	
2.	Long term goal	

CLIENT AGREEMENT AND SIGNATURES	
I, ____________________ [Client's Full Name], acknowledge that I have reviewed and discussed the contents of this assessment report with my assessor. I understand the goals, interventions, and referrals outlined and agree to actively participate in the proposed support plan.	
Client's Name:	
Client's Signature:	
Date:	
Assessor's Name:	
Assessor's Signature:	
Date:	

Note: This document outlines a service plan tailored to support the client's needs. It serves as a guideline to consider the co-existing needs of a client and the proposed support plan developed by the assessor.