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<p>Occupational Therapy New Zealand Whakaora Ngangahau Aotearoa (OTNZ-WNA)</p> <h2 style="color: #0056b3;">Occupational Therapist Case Manager in Mental Health</h2>	 <p><b>OTNZ - WNA</b> Occupational Therapy New Zealand Whakaora Ngangahau Aotearoa</p>
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## Background

Many mental health settings in New Zealand are utilising a case management model of service provision, particularly within community-based services. Debate in recent years has focused on the generic nature of many of the key tasks involved in the case manager role and of the potential threat to specific disciplines when working primarily as case managers. Some employers currently advertise for staff without specifying which discipline they require, while some job descriptions or position titles are generic in nature. These issues add to the risk of various disciplines becoming generic in practice and in particular, occupational therapists losing their unique occupational focus.

The Health Professionals Competency Assurance Act (2003) and the Occupational Therapy Board Competency Framework (2004) clearly indicate that occupational therapists should work within their discipline-specific scope of practice. The blueprint for Mental Health in New Zealand advocates equal access for clients/tangata whaiora to the full range of health disciplines. In addition to the pressure from these avenues, occupational therapists should be mindful of the advantages of maintaining discipline-specific roles and functions:

- Ensuring ongoing recognition of the value of occupational therapy in mental health
- Ensuring quality treatment options are available to clients/tangata whaiora
- Ensuring an interdisciplinary approach is available within teams

Occupational therapists in New Zealand practice within the context of the bi-cultural Treaty of Waitangi and have a responsibility to develop and maintain cultural competencies.

This position statement has been developed in consultation with occupational therapists working in mental health throughout New Zealand. It communicates to key stakeholders (clients/tangata whaiora, employers and other professionals) the position that Occupational Therapy New Zealand Whakaora Ngangahau Aotearoa advocates for occupational therapy service provision within a case management model.

## Philosophy

The specific way in which case management models are utilised varies from service to service. The overall purpose of using case management models is to ensure service provision that is client centred, has continuity, is accessible, promotes independence and ensures accountability. Case management models place the client at the centre of the process, ensuring the client's mental health needs are met in an efficient and effective manner.

Occupational therapists in mental health generally work in a way consistent with the principles of case management. Considering the client's occupational function and associated needs, maintaining a holistic view rather than focusing on the illness and having a client centred approach are fundamental to occupational therapy philosophy and practice. Occupational therapists use theory to guide practice, working from an evidence based practice perspective. This position statement should be read in conjunction with other New Zealand Association of Occupational Therapists Position Statements, including "The Role of Occupational Therapists Working in Mental Health", "Occupational Therapists and Mental Health Diagnosis" and "Supervision" in addition to local organisational policies.

## Key tasks

Occupational Therapy New Zealand Whakaora Ngangahau Aotearoa acknowledges that case management is interpreted and practised differently across the country. However the tasks most commonly expected in the case manager role include, but are not necessarily restricted to:

- Involving clients/tangata whaiora and whanau
- Mental state examination
- Risk assessment and risk management
- Treatment planning
- Input into medical diagnosis
- Monitoring of mental state
- Monitoring of medication compliance, effects and side effects
- Psycho-education
- Crisis intervention

- Arranging assessment or input from other disciplines
- Facilitating assessment for inpatient admission
- Facilitating assessment under the Mental Health Act
- Co-working with other agencies/Non-governmental Organisations (NGOs)
- Ensuring routine service provision requirements are met e.g. clinical reviews and risk assessment

## Key knowledge and skills

*Knowledge* required for mental health case managers includes:

- Education on mental illness and human development
- Risk assessment and management
- Mental state examination
- Crisis intervention
- Effects and side effects of medications
- Cultural awareness

*Skills* required for case managers fall into three distinct sets: clinical skills, relationship skills and liaison and advocacy skills. The majority of the specific skills required to work effectively as a case manager are integral to occupational therapy, and are transferable. These include:

- Involving clients/tangata whaiora and family/whanau
- Interviewing
- Observation
- Assessment of needs
- Micro-counselling
- Negotiation and liaison
- Time management and organisation
- Working with peoples of other cultures
- Reporting and recording
- Brokering other services
- Awareness of and access to resources

## Occupational therapists as case managers

The following tasks, knowledge or skills required for mental health case managers have not traditionally been part of undergraduate occupational therapy training:

- Conducting mental state examinations
- Ongoing risk assessment and management
- Crisis intervention
- Facilitating inpatient admission

- Facilitating assessment under the Mental Health Act

Accordingly, occupational therapists working as case managers and their employers should be aware that some of the knowledge and skills required for the key tasks of case management in mental health are not an integral part of occupational therapy training programmes. Occupational Therapy New Zealand Whakaora Ngangahau Aotearoa recommends new graduate occupational therapists have at least two years post graduate experience in mental health before taking on case management roles. Occupational therapists moving into mental health should consider additional training such as the Post Graduate Certificate in Mental Health (Allied Health). Occupational Therapy New Zealand Whakaora Ngangahau Aotearoa also recommends that when commencing a case management role for the first time the therapist have an identified preceptor/mentor as well as their usual professional supervision for the purpose of safely acquiring the necessary skills and knowledge. This person should be an individual identified as being the most appropriate preceptor for the case management role and may not necessarily be an occupational therapist.

It is expected that occupational therapists working as case managers also provide occupational therapy services as an integral part of their role.

## Recommendations

Occupational Therapy New Zealand Whakaora Ngangahau Aotearoa recommends that occupational therapists working within a case management model:

- Ensure they have received adequate initial training and have access to a preceptor or mentor to safely meet the requirements of the case management role
- Accept referrals where the presenting needs indicate an occupational focus
- Accept initial assessment responsibilities on the understanding that assessment of occupational involvement and function will be an integral part of that assessment
- Have an occupational focus to intervention planning and provision
- If utilising intervention techniques not traditionally considered occupational therapy (e.g. counselling, cognitive behavioural therapy, motivational interviewing), ensure an appropriate level of training and skill and conduct them with an occupation based purpose
- Utilise occupational therapy models in clinical reasoning processes
- Reflect occupational therapy focus and models in documentation and verbal reporting
- Maintain an overall recovery and strengths model focus to treatment

## Glossary

**tangata whaiora** – people seeking wellness, or recovery of self

**whanau** – family or an extended family/group of people who are important

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