Operational Guidelines: Home-Based Case Management

1. Purpose

These guidelines outline the procedures and protocols for conducting safe and effective home-based case management, including home visits. They aim to ensure both worker safety and quality service delivery.

2. Pre-Visit Planning

2.1 Risk Assessment

- Review client history and previous risk assessments
- Check for alerts on file
- Consult with supervisor regarding any identified risks
- Review previous worker safety incidents
- Check mobile phone coverage for visit location
- Assess need for joint visits
- Consider cultural and gender requirements

2.2 Visit Preparation

- Schedule visits during daylight hours where possible
- Confirm appointment with client 24 hours prior
- Ensure mobile phone is fully charged
- Take minimal valuables
- Have emergency contacts readily available
- Know exact location and travel route
- Plan exit strategy
- Check vehicle condition (fuel, tires, etc.)

2.3 Documentation Requirements

- Update electronic calendar with visit details
- Record in team diary:
    - Client name and address
    - Expected arrival time
    - Expected departure time
    - Vehicle registration
    - Contact phone number

3. During the Visit

3.1 Arrival Procedures

- Park in direction of exit
- Observe surroundings before leaving vehicle

- Keep car keys accessible
- Note entry/exit points
- Follow client's preferred entry protocol
- Maintain professional boundaries

3.2 Safety Protocols

- Position self near exit
- Maintain awareness of surroundings
- Keep phone accessible
- Monitor for escalating situations
- Trust professional instincts
- Be aware of other people present
- Respect client's space

3.3 Professional Practice

- Maintain clear communication
- Explain purpose of visit
- Set clear timeframes
- Document observations
- Respect privacy and confidentiality
- Work within scope of role
- Maintain professional boundaries

4. Visit Conclusion

4.1 Exit Procedures

- Summarize visit outcomes
- Confirm next appointment if required
- Leave if safety concerns arise
- Check surroundings when leaving
- Lock car immediately upon entry

4.2 Post-Visit Tasks

- Mark self as safe in office system
- Document visit details
- Report any incidents
- Update risk assessment if required
- Debrief with supervisor if needed

5. Emergency Procedures

5.1 Duress Response

- Use organization's duress code word/system
- Contact emergency services if required
- Leave immediately if safe to do so
- Report to supervisor
- Document incident

5.2 Incident Reporting

- Complete incident report
- Debrief with supervisor
- Review risk assessment
- Update safety protocols if needed
- Consider need for police report

6. Specific Circumstances

6.1 Rural/Remote Visits

- Check vehicle condition
- Carry emergency supplies
- Know exact location details
- Check mobile coverage
- Consider satellite phone if required
- Plan for weather conditions

6.2 After Hours Visits

- Require supervisor approval
- Must be justified as essential
- Require documented safety plan
- Consider joint visits
- Extra communication protocols required

6.3 High-Risk Situations

- Mandatory joint visits
- Clear communication plan with office
- Pre-approved safety plan
- Regular check-in times
- Exit strategy in place

7. Documentation Standards

7.1 Required Records

- Visit details and outcomes
- Risk assessment updates
- Client progress notes
- Incident reports if applicable
- Safety plan modifications
- Follow-up actions required

7.2 Confidentiality

- Secure storage of information
- Privacy considerations
- Information sharing protocols
- Consent requirements

- File security

8. Quality Assurance

8.1 Supervision Requirements

- Regular case reviews
- Safety plan updates
- Professional development
- Incident debriefing
- Practice reflection

8.2 Monitoring and Review

- Regular guideline review
- Incident analysis
- Staff feedback
- Client feedback
- Continuous improvement

9. Cultural Considerations

- Cultural safety practices
- Use of interpreters
- Cultural protocols
- Gender considerations
- Religious observances
- Family/community dynamics

10. Training Requirements

- Core safety training
- De-escalation techniques
- Risk assessment
- Cultural competency
- First aid
- Emergency procedures
- Vehicle safety

Review Date

This guideline is to be reviewed annually or as required following critical incidents.

Last Review: [Date] Next Review: [Date]