# **Case Study Assessment Task 4.1 - Client Briefing Document**

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| **Dear Volunteer.**  Thank you for agreeing to participate in the candidate’s assessment.  The candidate’s assessment includes a role-play activity in which you will take part.  To fulfil your role in the activity, review this Briefing Document carefully. Discuss any queries you may have about this document with the candidate’s assessor or training organisation.  *Thank you very much, and have a good day.* |

## **Your Role**

You will act as Trina, an aged care client at Lotus Compassionate Care. The candidate will act as Trina’s support worker.

## **Volunteer Instructions**

### Before the activity

1. Read this *Briefing Document* and other relevant simulated documents. The candidate’s assessor will also walk you through these documents.
2. Secure a copy of Case Study Task 4.1 Benchmark Answers from the Assessor.
3. Raise any questions or concerns you may have about this document or the role-play activity with the candidate’s assessor.

### During the activity

1. Have this *Briefing Document* and a copy of Case Study Task 4.1 Benchmark Answers with you during the role-play activity.
2. Participate in the role-play discussion. Follow the cues and scripts provided in the *Discussion Guide* section of this document.

## **Background**

### Lotus Compassionate Care

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| Lotus Compassionate Care is committed to providing high-quality care and support to people with disability, seniors, and their carers living in the Cascade Peak Community.  You can read more about the organisation by clicking on the link below:    [© Harvard Management Institute Pty Ltd.](https://compliantlearningresources.com.au/network/lotus-v2/)  *(Username: newusername Password: newpassword)* |

### Case Study - Trina

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| **SCENARIO**  You are assigned to support Trina, a 70-year-old diagnosed with early-stage Alzheimer's. Trina was very talkative during your previous interactions with her. She enjoys a number of hobbies, including watching the television and taking a walk every morning to meet with her friends. Her daughter, Sam, moved in with her to become her primary carer.  You were going to meet Trina after lunch to discuss changes in her individual care plan. On the day of your visit, you hear Sam yelling at Trina. The door suddenly opened, and you saw Sam gripping Trina’s arm and trying to drag her out of the door. Sam immediately let go when she saw you. You asked what was happening and Sam brushed it off, saying she will do errands by herself.  You notice that Trina has significantly lost weight. She confesses that she has been feeling very lonely. While talking to her, you also see bruises on her arm. She also lamented about how she couldn’t access her bank account anymore. You asked if Sam tried asking the bank for her about this. She noticeably flinched and looked scared upon hearing her name. She explained that Sam thinks Trina is no longer capable of handling her personal finances due to her condition. Sam handles her finances for her. However, you note unpaid bills piled on the kitchen counter. There is also no food in their pantry.  You tried asking what Trina does in her leisure time. She says she does not really see the point in going out anymore and has not caught up with her favourite TV shows. She has not seen her friends for over two weeks. |

## **Role Play Discussion Guide**

### General Disposition

* Throughout this roleplay activity, you must act in a way that reflects Trina’s age, health condition and disposition.
  + Trina is 70 years old. Your body movements must reflect Trina’s age – do not move too quickly or use forceful or jerking motions, except during the mention of Sam’s name.
  + Trina has early stage Alzheimer’s. As such, you must show relevant symptoms, such as:
    - Asking for questions to be repeated to you
    - Pausing lengthily before answering questions
    - Stating that you do not remember certain events, then asking for some time so that you may remember them
  + You must present a neutral or blank expression. This must be reflected in your tone of voice, facial expressions and body movements. However, you must show concern or agitation upon the mention of Sam’s name. This can be shown through flinching or jolting.

### The candidate will share their findings with you

* The candidate will inform you of their findings:
  + Variations in your wellbeing
    - Refer to your copy of the benchmark answers.
    - If the candidate’s findings do not match the benchmark answers, you must inform the candidate that you think their findings are incorrect. Do NOT provide the candidate with the benchmark answers.
  + Cultural issues impacting your wellbeing
    - Refer to your copy of the benchmark answers.
    - If the candidate’s findings do not match the benchmark answers, you must inform the candidate that you think their findings are incorrect. Do NOT provide the candidate with the benchmark answers.
  + Aspects of supporting your wellbeing that are outside of the candidate’s scope of knowledge, skills or job role
    - Allow the candidate to state aspects of support that are outside of their knowledge, skills or job role. There are no two definite correct answers here.

### The candidate will ask you if you agree that the financial issues mentioned have affected your wellbeing.

* The candidate will seek your confirmation on their findings regarding the financial issues that they believe are impacting your wellbeing.
  + You must pause, then reply with the following:

Volunteer: *If you say they’re affecting me, then I think you’re right. I may be having some money problems, but I always forget.*

### The candidate will use questioning techniques to confirm their understanding.

* The candidate will use open-ended questions, e.g. *What do you think?* or *Why do you think you’ve been having money problems?*
  + You must reply to these questions in a way that is consistent with the scenario and Trina’s profile.
    - Refer to the details provided in the scenario.
    - Do NOT mention Sam’s name.
  + A sample conversation is provided below:
    - Candidate: *Why do you think you’ve been having money problems?*
    - Volunteer: *I’m not sure. But I think everything’s so darn expensive these days. I haven’t been able to pay my bills, even with help.*
* The candidate will use probing questions for elaboration, e.g. *You mentioned something earlier, can you please elaborate on that?*
  + You may provide responses that are consistent with the scenario and Trina’s profile. You must answer the candidate’s questions in a way that does not deviate from the scenario.
  + A sample conversation is provided below:
    - Candidate: *You mentioned that you have had help in paying your bills. Did you encounter money problems before Trina came to help you?*
    - Volunteer: *Um… I probably did. I don’t remember. Can we stop talking about Tina, please? I don’t… I don’t want her to get angry.*

End of Briefing Document