

1. Introduction

- Introduce yourself and explain the principles of case management

Materials: Patient Information Leaflet

2. Conducting the Assessment

- Assess how the patient's health is impacting on their life using the standardised assessment form.

Materials: Patient Assessment Document (for case manager)

3. Devising the personal health plan

- record problems, professionals currently involved, actions to take
- agree and set review date for each problem.

Materials: Personalised Health Plan

4. Goal Setting (if required by the patient)

- Help the patient to identify a problem to address. Use goal setting to help them 'break down' the problem into manageable parts.
- Introduce Personalised Health Plan; patient to record up to 3 goals

Materials: Personalised Health Plan, Goal Setting Information Leaflet

4. Action Planning (if required by the patient)

- Help the patient to plan how to achieve each goal.
- Patient to record: what they will do, how they will do it, where they will do it, when they will do it, and with whom they will do it

Materials: Personalised Health Plan

5. Providing Information

- Provide individualised self management resources

Materials: Lists of self management resources

6. Building Self-Efficacy

- Ensure patient feels confident that they can achieve their goals.
- Discuss barriers to success and ways to overcome. Patient to record reasons to expect success.

7. Deciding a review date

Record preferred contact details and date for review

8. Encouraging self monitoring

Patient to record successes and difficulties in pursuing goals

9. Confirming Confidentiality

Increase trust by signing the confidentiality agreement