Case Manager interview questions

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What to expect

Case manager interviews mix questions about how you run the day-to-day mechanics of the role (assessment, planning, referrals, documentation) with questions that test judgement under pressure and your ability to sit with difficult client situations. Panels often include a team leader or senior practitioner and, in government or funded services, may include a compliance or quality representative.

- **Process:** Questions asking you to walk through how you'd handle assessment, care planning or documentation in practice.
- **Behavioural:** Past-experience questions about caseload management, difficult clients or working under pressure.
- **Scenario / safety:** Hypothetical situations involving risk disclosure, safety concerns or a client in crisis, testing judgement rather than recall.
- **Client-facing:** Questions about handling disagreement, resistance or distress from clients and families.

Expect an initial phone or video screen focused on your background and availability, followed by a panel interview of 45 to 60 minutes covering process and scenario questions. Some agencies include a short written case study or role-play exercise, and reference checks are usually thorough given the vulnerable client population involved.

1. Walk me through how you would assess a new client's needs and risks when you first take on their case.

Why they ask

This tests whether you understand the practical steps of intake assessment, not just the theory, and whether you factor in risk identification early.

How to structure your answer

Answer as a sequential walkthrough: what you do first, what you check for, how you decide priority, and what you document at each stage.

Example answer

“I'd start by reviewing any referral information already on file, then arrange an initial interview, ideally in person or via a home visit if that's appropriate for the client group. During that conversation I'm listening for immediate safety concerns as well as the client's own stated goals. I use a risk assessment template to make sure nothing gets missed, then draft an initial plan based on both the risks identified and what the client says matters most to them. Everything gets logged in the case management system straight away so the next person picking up the file has an accurate picture.”

2. Tell me about a time you had to manage a heavy caseload with competing priorities.

Why they ask

Case managers routinely juggle multiple clients with different urgency levels, so panels want evidence you can triage without dropping anyone.

How to structure your answer

Use STAR: describe the situation, the task facing you, the action you took to prioritise, and the result.

Example answer

“I once had two clients needing urgent attention on the same afternoon, one facing a potential housing crisis and another due for a scheduled review. I quickly assessed which situation carried

immediate risk versus which could be managed by phone, handled the housing issue first by contacting the provider directly, then completed the scheduled review by phone that evening. Both clients were followed up within the day and neither fell through the cracks, though I did flag to my supervisor that caseload volume was becoming a pressure point."

3. A client discloses a safety risk to you or a family member during a home visit. What do you do?

Why they ask

This checks your judgement under pressure and your knowledge of mandatory reporting and escalation obligations.

How to structure your answer

Talk through immediate priorities first, then process: safety, disclosure handling, reporting obligations, and follow-up, in that order rather than a general answer.

Example answer

"My first priority is the immediate safety of everyone involved, so I'd assess whether the situation needs urgent intervention before I leave the visit. I'd document exactly what was disclosed, using the client's own words where possible, and follow my agency's mandatory reporting and escalation procedures without delay. I'd also make sure the client understands what happens next, so they're not blindsided by any report being made, and I'd update the case notes and notify my supervisor the same day."

4. How do you handle a situation where a client disagrees with the plan you've recommended for them?

Why they ask

Client-facing questions like this test whether you can balance client autonomy with professional judgement and agency requirements.

How to structure your answer

Frame your answer around listening, negotiation and where the line sits between client choice and non-negotiable safety requirements.

Example answer

"I try to understand why the client disagrees before pushing back on my own recommendation, since often there's a practical barrier I hadn't accounted for, like transport or trust in a particular service. Where there's room to adjust the plan to fit their preferences, I will, because engagement matters more than a plan looking neat on paper. If there's a safety or funding requirement that isn't negotiable, I explain that clearly and look for other areas where they do have choice, so they don't feel entirely without control over their own case."

5. What's your experience with case management software and meeting documentation requirements?

Why they ask

Funded services are audited on documentation standards, so this checks both your tool familiarity and your discipline around record-keeping.

How to structure your answer

Answer with a brief statement of systems you've used, then an example of how you keep documentation current under time pressure.

Example answer

"I've worked with case management platforms similar to Humm and CADS for logging case notes, referrals and plan reviews, along with electronic health records where relevant. Documentation is easy to let slip when caseloads are heavy, so I block time at the end of each day specifically for

updating notes rather than letting them pile up, which has kept me consistently ready for internal audits without a last-minute scramble."

6. How do you look after yourself when working with clients facing difficult or traumatic circumstances?

Why they ask

Panels ask this because burnout and turnover are real risks in this field, and they want to see self-awareness rather than a claim of being unaffected.

How to structure your answer

Answer about strategies you use, avoiding a claim that the work never affects you.

Example answer

"I debrief with my supervisor or team after particularly difficult visits rather than carrying it home, and I keep clear boundaries around when I'm contactable outside work hours. I also make a point of noticing my own reactions to a case, so if something is sitting heavily with me I raise it early through supervision rather than waiting until it affects my judgement or my patience with clients."