Manage personal case loads

Overview

This standard is about managing personal case loads. It is aimed at people who provide advice and guidance to clients who use services such as public services, education and training, health services and those provided by welfare professionals and others.

The standard looks at recording and maintaining case notes, reviewing personal case loads and establishing priorities for dealing with personal case loads.

Performance criteria

You must be able to:

1. check case notes are completed and provide a clear case history in line with organisational requirements
2. review information on managing case loads in line with organisational requirements
3. monitor your progress in achieving required outcomes for cases in line with organisational requirements
4. identify obstacles to achieving required outcomes for your case load in line with organisational requirements
5. identify improvements in managing your case load
6. exchange information on cases with colleagues and other professionals in accordance with the case and organisational requirements
7. establish criteria for setting priorities for cases in line with organisational requirements
8. assess cases against specified criteria
9. identify actions required to meet deadlines in line with organisational timeframes
10. identify cases of high priority that need specific action
11. inform others of the need to prioritise specific cases in line with organisational requirements
12. check high priority cases are identified, implemented and assigned appropriate resources in line with organisational requirements
13. monitor the effects of priorities on your case load in line with organisational requirements
14. check cases receive appropriate attention within organisational time scales
15. provide clear rationale for priorities in line with organisational requirements
16. comply with all relevant legal, professional, and organisational requirements and guidelines when managing personal case loads
17. record information about cases and actions undertaken in line with organisational requirements

Knowledge and understanding

You need to know and understand:

1. the importance of complying with relevant legal, professional and organisational requirements and guidelines
2. legislation, codes of practice, organisational policies and procedures in relation to job role/activities undertaken
3. types of information to record about cases and the importance of recording information
4. how to confirm case notes are accurate
5. how case notes should be structured and the detail that should be included
6. recording requirements of your organisation, including how to store recorded information securely
7. why it is important to comply with requirements for case loads and the implications of not complying with them
8. how to obtain information on requirements of case load for your role
9. information to review on personal case loads and timescales for reviewing
10. how many cases can be managed and how to monitor the progress of cases
11. obstacles that could occur in achieving required outcomes for cases and how to overcome them
12. factors that affect the quantity of cases being managed and improvements identified for managing them
13. who should provide information on cases and who should be provided with information
14. criteria to be used for setting priorities and how to agree priority criteria
15. how to match cases against priority criteria and the implications of not meeting deadlines
16. how to determine highest priorities and who should be informed of these
17. those responsible for implementing cases
18. which resources to assign to cases
19. the importance of providing a clear rationale for priorities and types of conflicting or differing priorities

Manage personal case loads

Developed by	Skills for Justice
Version Number	2
Date Approved	February 2015
Indicative Review Date	February 2020
Validity	Current
Status	Original
Originating Organisation	Learning and Skills Improvement Service
Original URN	AG014
Relevant Occupations	Education and training; Housing Advisors; Health, Public Services and Care; Public Services
Suite	Advice and Guidance
Keywords	workload; case load; work record; notes