

<b>Unit Title:</b>	<b>Manage personal case load</b>
OCR unit number	2
Unit sector reference	AG14
Level:	4
Credit value:	4
Guided learning hours:	20

## Unit purpose and aim

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To show that the candidate understands the importance of prioritising cases and allocating resources, and keeps suitable records to enable this process.

<b>Learning Outcomes</b>	<b>Assessment Criteria</b>
<p><b>The Learner will:</b></p> <p>1 Be able to maintain case notes</p>	<p><b>The Learner can:</b></p> <p>1.1 Record key information about each case            1.2 Record all actions being undertaken for clients            1.3 Ensure case notes are accurate and contain appropriate detail            1.4 Ensure case notes are structured in a way that gives a clear history</p>
<p>2 Be able to review personal case load</p>	<p>2.1 Review all relevant information            2.2 Monitor the progress of all cases            2.3 Identify any obstacles in achieving the required outcomes for cases            2.4 Exchange information on the cases according to the service's procedures            2.5 Identify improvements that can be made to the management of cases</p>
<p>3 Understand factors that affect case loads</p>	<p>3.1 Explain what types of obstacle may occur and how to overcome it            3.2 Explain any factors that may affect the number of cases managed</p>

Learning Outcomes	Assessment Criteria
4 Be able to establish priorities for dealing with personal case load	4.1 Establish criteria for setting priorities 4.2 Assess cases against the criteria to show which cases need high priority 4.3 Identify any immediate actions that may be required to meet deadlines 4.4 Inform relevant people of the need to prioritise specific cases 4.5 Ensure appropriate resources are allocated to the cases 4.6 Monitor the effect of the priority cases on the rest of the caseload 4.7 Ensure all cases receive appropriate attention.

## Assessment

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This qualification is internally assessed by centre staff and externally verified by an OCR Assessor.

## Evidence requirements

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Simulation is not allowed for any part of this unit.

All evidence of your performance must be generated in your workplace, in accordance with organisational procedures and national, local and professional guidelines.

Prior to commencing this unit you should agree and complete an assessment plan with your assessor which details the assessment methods you will be using and the tasks you will be undertaking to demonstrate your competence.

You must provide your assessor with evidence for all of the assessment criteria for each learning outcome. Your assessor must be satisfied that you are able to undertake your work activities consistently over a period of time.

It is up to your assessor, working with the guidance provided, to determine a suitable mix of assessment methods, and to decide on the amount and type of evidence that is required to judge your competence.

The preferred assessment methods to be used for this unit are:

**Direct observation of performance:** Observation of you undertaking real work activities. This could involve interacting with clients or providing information to clients.

**Evaluation of work products:** Any item generated from real work activities. Evidence could be from different locations and from a variety of sources. This could include case notes, records and correspondence. It is not required in your portfolio and can remain where it is normally stored. The location and relevance of the evidence must be indicated in your portfolio. The evidence must be available for assessment and verification.

**Questioning:** Questions to ensure that you are able to apply your knowledge to your performance in the real work place. This may be used for areas not observed or evidenced through work products. This may be oral or written but evidence of the questioning must be recorded in an appropriate format. In addition your assessor may ask questions to clarify aspects of your practice.

**Witness testimony:** A confirmation or authentication of activities described in your evidence which your assessor has not seen. This could include a report or statement from a line manager or other appropriate person.

**Professional discussion:** A structured discussion with your assessor, about your performance of specific activities and a reflection on the reasons why you practised that way. The key aspects of this discussion will be recorded in a suitable format as evidence in your portfolio.

## National Occupational Standards (NOS) mapping/signposting

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This unit is derived from the National Occupational Standards in Advice and Guidance 2006 (Lifelong Learning UK).

NOS can be viewed on the relevant Sector Skills Council's website or the Occupational standards directory at [www.ukstandards.co.uk](http://www.ukstandards.co.uk).

## Additional information

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For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications*' (A850) on the OCR website [www.ocr.org.uk](http://www.ocr.org.uk).