

Unit Title: Manage personal case load

OCR unit number: 13
 Sector unit number: AG14
 Level: Level 4
 Credit value: 4
 Guided learning hours: 20
 Unit reference number: Y/602/5189

Unit purpose and aim

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

Learning Outcomes	Assessment Criteria	Teaching Content
The Learner will: 1 Be able to maintain case notes	The Learner can: 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	<ul style="list-style-type: none"> Likely to include client details, action plans, appointments, contacts with potential employers and updates of progress.
2 Be able to review personal case load	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	<ul style="list-style-type: none"> Take into account the successes and those that are not making progress. Review those that are not progressing and identify any areas that are a problem for the individual client. Suggest alternatives. Consideration should be given to discussing the case with third parties in line with procedures. Evaluate the progress and look at ways in which the caseload could be managed differently.

Learning Outcomes	Assessment Criteria	Teaching Content
3 Understand factors that affect case loads	3.1 Explain what types of obstacle may occur and how to overcome them 3.2 Explain any factors that may affect the number of cases managed	<ul style="list-style-type: none"> Review the problems that have occurred in managing the caseload. Evaluate how these have come about: due to the range of client types, the number of clients, etc.
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	<ul style="list-style-type: none"> Consider the current method of prioritising clients. In particular consider the cases needing the highest priority and the effect the number of these, or the level of difficulty handling these, has on the rest of the caseload. Explain who else needs to be informed of the priorities, and how to ensure resources are allocated to help meet deadlines.

Assessment

This unit is internally assessed by centre staff and externally verified by OCR.

Evidence requirements

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.

Guidance on assessment and evidence requirements

Please refer to the OCR Centre Handbook available from the OCR website www.ocr.org.uk.

You should refer to the 'Admin Guide: Vocational Qualifications (A850)' for *Notes on Preventing Computer-Assisted Malpractice*.

National Occupational Standards (NOS) mapping/signposting

The mapping in the table below provides an indication of where evidence might be available for assessment against some of the knowledge and understanding contained in the national occupational standards (NOS). It does not claim to guarantee that evidence will meet the NOS.

NOS can viewed on the relevant Sector Skills Council's website or the Occupational standards directory at www.ukstandards.co.uk.

Occupational standards	Unit number	Title
Advice and Guidance	AG14	Manage personal case load

Functional skills signposting

This section indicates where candidates may have an opportunity to develop their functional skills.

Functional Skills Standards					
English		Mathematics		ICT	
Speaking and Listening	✓	Representing		Use ICT systems	✓
Reading	✓	Analysing		Find and select information	✓
Writing	✓	Interpreting		Develop, present and communicate information	

Resources

Evidence record sheets and witness statements are available from the OCR website www.ocr.org.uk.

Access to sources of under-pinning knowledge such as websites, books, journals, etc, might be of help, but you are not expected to reproduce other people's written work.

Additional information

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 .