

Unit Title:	Manage a personal caseload/work responsibilities in the career development sector
OCR unit number:	Unit 20
Level:	4
Credit value:	4
Guided learning hours:	20

## Unit purpose and aim

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This unit aims to develop the learner's ability to prioritise and manage their work responsibilities including, where relevant, a personal caseload of clients.

Learning Outcomes	Assessment Criteria
<p>The learner can:</p> <p>1. Understand the purpose of caseload management and the factors that affect caseloads</p>	<p>The learner will:</p> <p>1.1 explain the purpose of caseload management</p> <p>1.2 explain the need for clear, accurate and detailed records</p> <p>1.3 explain obstacles that may occur and how to overcome these</p> <p>1.4 explain any factors, including contractual obligations, that may affect the number of cases managed and the quality of provision</p>
<p>2. Be able to maintain case notes</p>	<p>2.1 record key information about each case in line with legislative and provider's requirements</p> <p>2.2 record all actions being undertaken for clients and by clients</p> <p>2.3 make sure case notes are accurate and contain appropriate detail including the intended outcomes of provision</p> <p>2.4 make sure case notes are structured in a way that gives a clear history and enables review and handover</p>
<p>3. Be able to evaluate the intended outcomes of the provision</p>	<p>3.1 review relevant information, including the characteristics and particular needs of the caseload</p> <p>3.2 monitor the progress of cases</p> <p>3.3 identify potential obstacles in achieving the required outcomes for cases</p>

Learning Outcomes	Assessment Criteria
	3.4 exchange information on the cases according to the provider's procedures and relevant legislation 3.5 identify improvements that can be made to the management of cases
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 make sure appropriate resources are allocated to the cases 4.6 monitor the effect of the priority cases on the rest of the caseload 4.7 make sure all cases receive appropriate attention to agreed timescales

## Assessment

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This unit is internally assessed and externally verified by OCR Assessors. Simulations are not allowed.

To achieve a Pass, learners must produce evidence which meets all the assessment criteria.

## Evidence requirements

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All evidence of a learner's performance must be generated in the workplace. Learners must produce their own work and assessors use a range of assessment methods. More information about suitable forms of evidence can be found in the OCR Level 6 Diploma in Career Guidance and Development Centre Handbook.

## Guidance on assessment and evidence requirements

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In order to provide appropriate evidence to meet the assessment criteria for this unit the following methods can be used:

- assignment/report
- observation
- product evidence
- professional discussion
- witness testimony.

The use of observation should preferably be face to face or through 'visual technology'. The use of audio recordings is allowed where the above options are not accessible or for a telephone guidance-based service.