**CASELOAD MANAGEMENT**

The aim of a caseload management tool is to support practitioners to prioritise and manage their caseloads effectively. It should support staff to plan their work and to ensure caseloads are at a manageable level. This tool can be used within a case management process to ensure safe and timely delivery of services where necessary, and to support the worker to identify when clients can be safely discharged from their care or supported by Support Staff via the nursing process.

\*\*This tool is not currently exhaustive or complete. Scoring has not yet been considered as part of the process; nor has weighting. These aspects of caseload management will be considered at a later date once this tool has been piloted and successfully approved.

**Structure of caseload management**

Caseload management is carried out on an individual basis (peer/group reviews could be considered as part of this process). Each member of the team will participate and use the same standard format to complete the process.

**Frequency**

Case load management sessions will take place on a monthly basis; sessions will last 1 – 1.5 hours.

**Recording**

Caseloads will be recorded on standard form.

**Role of practitioner**

The Practitioner is responsible for the following:

* Prioritising which individuals to discuss during session
* Providing details of overall caseload – considering level of input required; analysis over period of time to monitor trends in intervention; completed and up to date recording form
* Identifying clients to be prepared and readied for closing/stable casing before next session.
* Provide case closure forms for those clients identified in previous session.
* Provide samples of care plans/health action plans and risk assessments to review.

**Role of supervisor**

Supervisor will:

* Review caseload with practitioner
* Provide scoring for comparison of randomly selected clients
* Review sample documents with practitioner and discuss, with feedback.
* Agree clients for closure/stable casing