



**CASELOAD MANAGEMENT/ADMINISTRATIVE SUPERVISION**

Each Key Worker/Clinician is responsible for managing their caseload and ensuring that it accurately reflects their current client base.

Process	Tasks/Standards	Who
<b>Print caseload</b>	<ul style="list-style-type: none"> <li>Print caseload ready for monthly administration supervision</li> </ul>	Clinician/case manager
<b>Check caseload</b>	<ul style="list-style-type: none"> <li>Check list for accuracy, taking note of new assessments and discharges.</li> <li>Amend any discrepancies</li> <li>Give list to the Regional Coordinator/Manager at administrative supervision to work through</li> </ul>	Clinician/Case Manager
<b>Amend data input</b>	<ul style="list-style-type: none"> <li>Update iSoft</li> </ul>	Clinical Co-ordinator
<b>Statistics</b>		
<b>Appointment Scheduling</b>	<ul style="list-style-type: none"> <li>Enter referral/ contacts as per guidelines and regional variances</li> <li>Update from planned to actual once client attends.</li> <li>If DNA, enter on visit schedule.</li> </ul>	Case Manager/ Clinician
	<ul style="list-style-type: none"> <li>Enter appointments retrospectively or planned.</li> <li>Update to actual when time relevant</li> </ul>	Case Manager / Clinician