ULSU Advice Centre Case Allocation Procedure

Procedure

Cases will typically be allocated to an Advice Worker depending on who is available when a client initially accesses the service.

It is recognised that this may not always be plausible and in some instances the case would need to be transferred to another staff member. This may be due to a conflict of interest, the complexity of the case and/or equal case allocation between Advisors.

Advisors are typically expected to work with any cases that are presented to them. It is recognised, however, that each Advice Worker has limits in their knowledge base. If an Advice Worker feels that a case is too complex or is beyond their capabilities, they must explain to the client that they are unable to take on the case. The Advice Worker must then transfer the case to another Advisor.

Clients will be notified if their case is transferred to another Advisor and this will be clearly documented in the case notes.

All Advice Workers are encouraged to discuss cases amongst themselves on a day to day basis in line with ULSU Group Advice Centre Confidentiality Policy. This is to encourage wider learning by all staff and to ensure that different angles to a problem can be explored.

Supervision sessions will be organised by the ULSU Deputy CEO to discuss any potential training needs that may arise as a result of case allocation and these needs will be addressed appropriately.

Last Reviewed: August 2020
Next Review Date: August 2021